

PowerDMS
by NEOGOV

Leveraging Analytic Reporting

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Objectives:

- Access Analytic Reports and Dashboards.
- Apply filters to reports.
- Automate reporting via email for your organization.
- Download or export data.



A Few Things to Note:

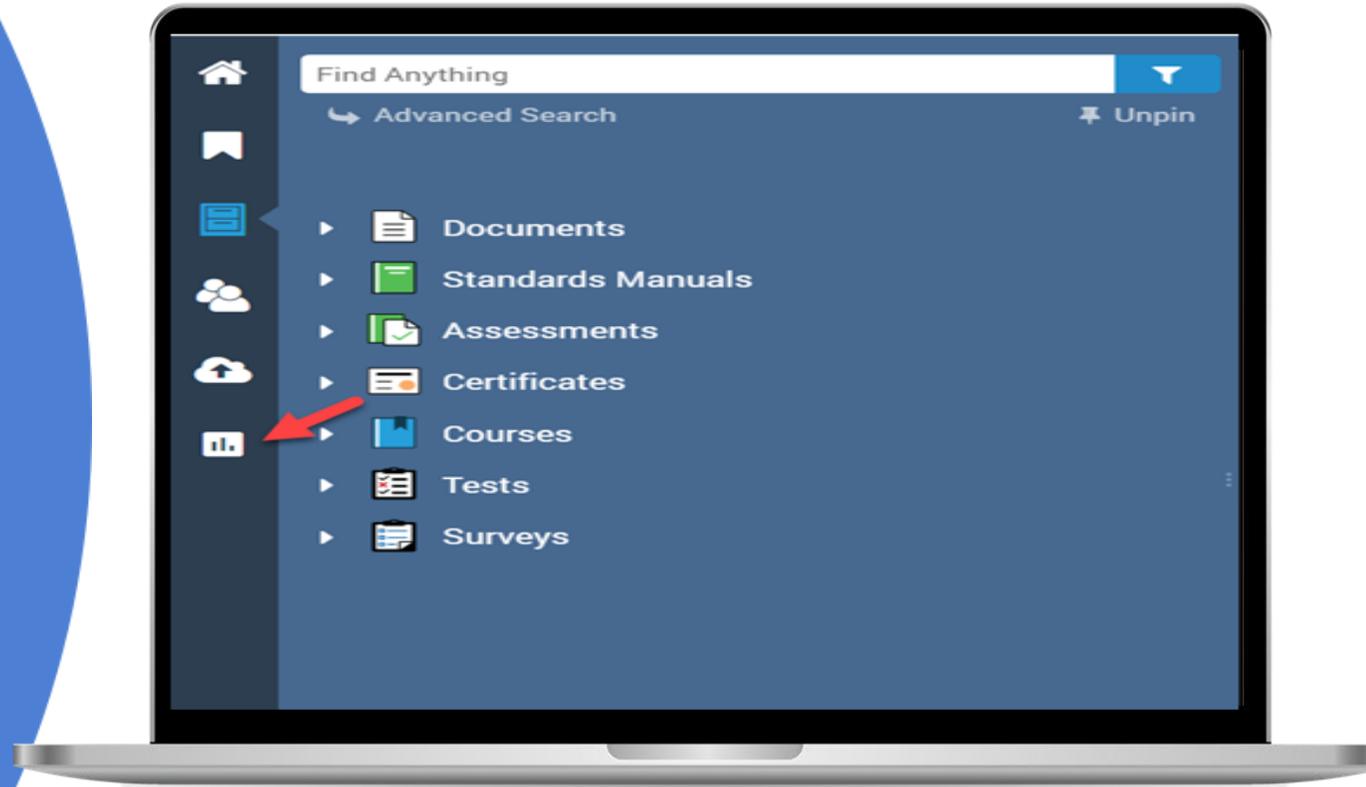
- This session is being recorded.
- The recording will be automatically Emailed to all registrants of this session, as soon as it becomes available.
- You can and should download a copy of this presentation from the Handouts section of the GoToWebinar sidebar.
- You can type in your questions any time within the questions field of GoToWebinar



PowerDMS

Accessing Analytics

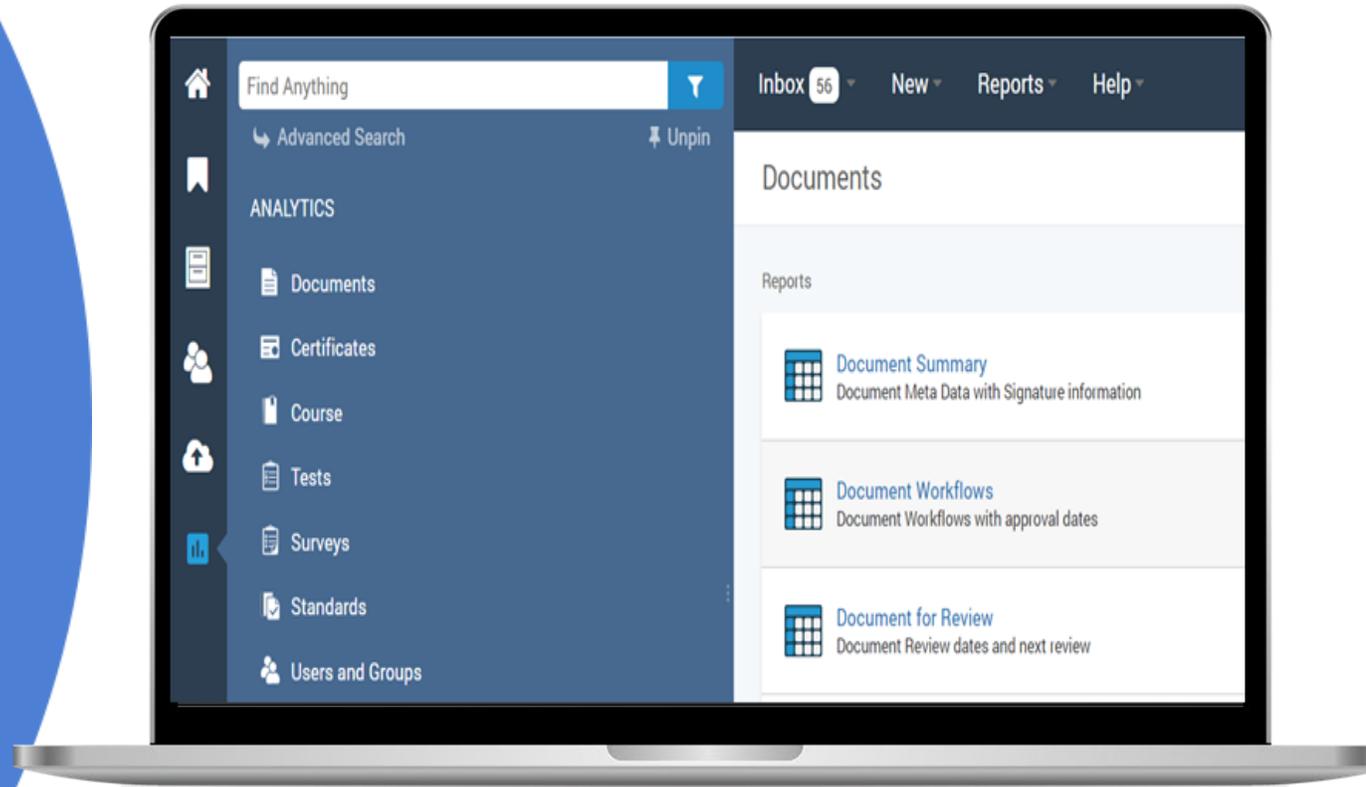
- Navigate to your PowerDMS homepage.
- Select the Reports icon on the far-left dark blue menu.



PowerDMS

Select your Report or Dashboard

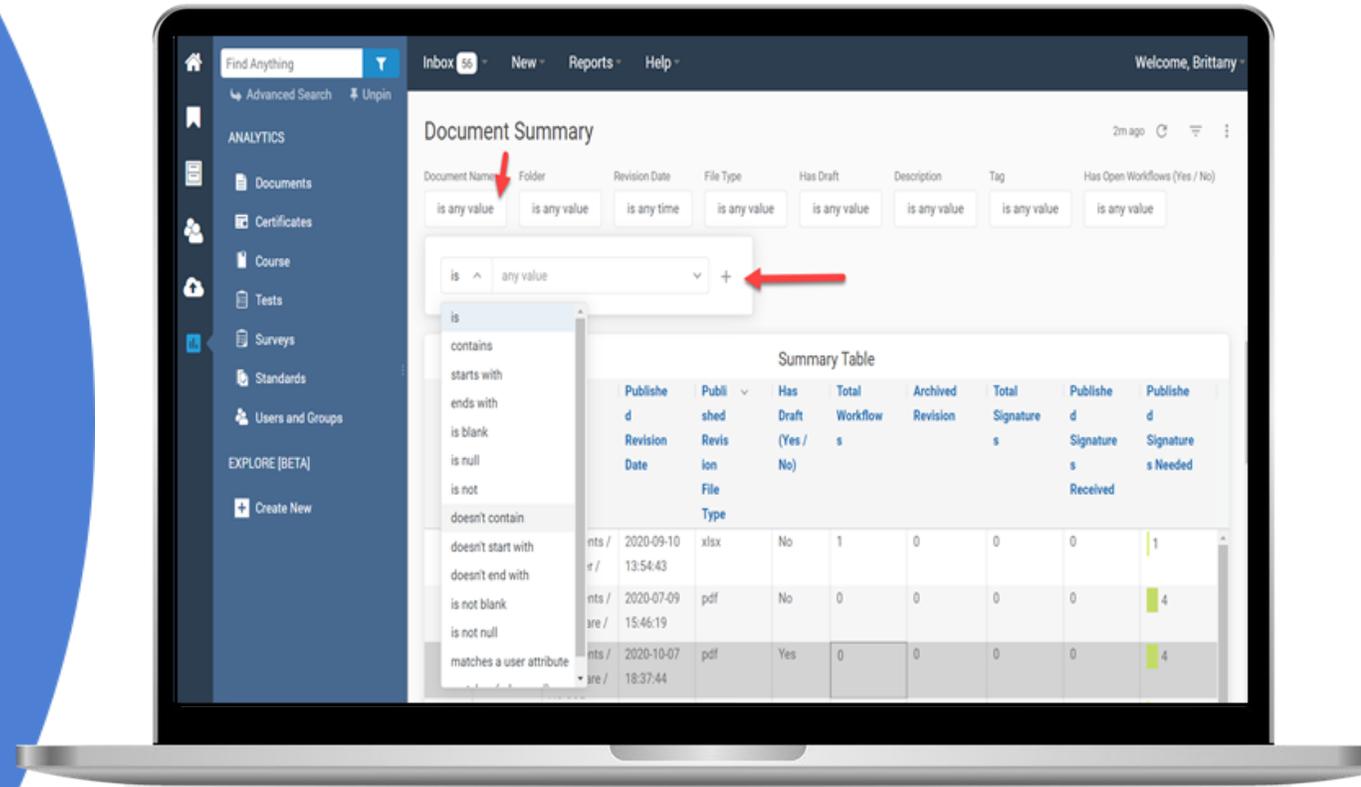
- Select the report or dashboard from the report menu.
- Each report lists summary of information included.



PowerDMS

Adjust Filtering Criteria

- Once you select the report/dashboard, you can narrow results using filters.
- The + icon allows you to add multiple filters.
- Once all filters are selected, click the circular blue arrow icon in the upper right corner of the page.

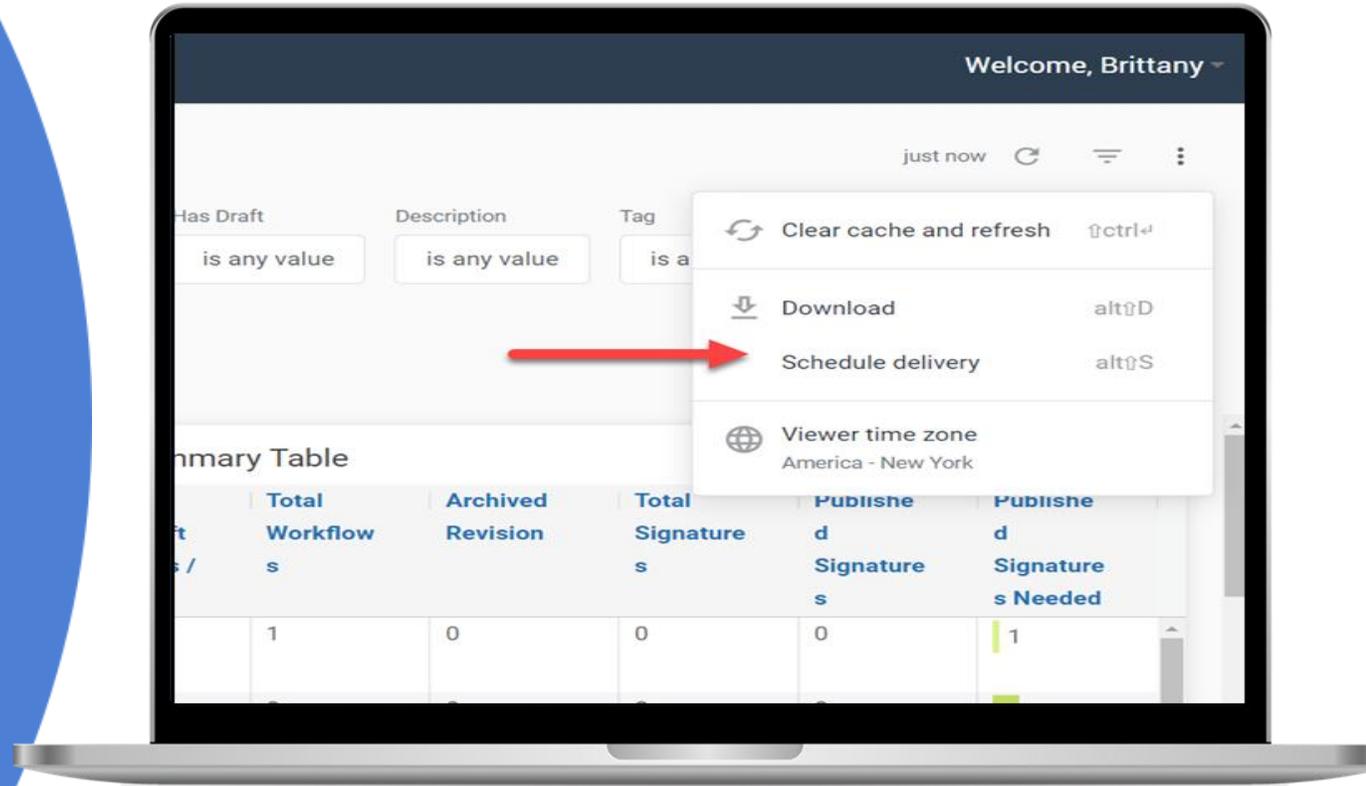


Filter Drop-down Choices	What Filters Mean
1. Is	File must be what is entered.
2. Contains	File must contain what is entered.
3. Starts With	File must start with what is entered.
4. Ends With	File must end with what is entered.
5. Is blank	Will include all (documents, names etc.) that were left blank
6. Is Null	Includes nothing.
7. Is Not	Will exclude any results that include your word.
8. Doesn't Contain	Will exclude any results that include your word.
9. Doesn't Start With	Will exclude any results that start with your word.
10. Doesn't End With	Will exclude any results that end with your word.
11. Is Not Blank	Will include all documents that are not blank.
12. Is Not Null	Will include all results that are not empty
13. Matches a User Attribute	Not applicable in PowerDMS
14. Matches (advanced)	Any part of the file/user you enter matches the word you enter.

PowerDMS

Scheduling Report Delivery

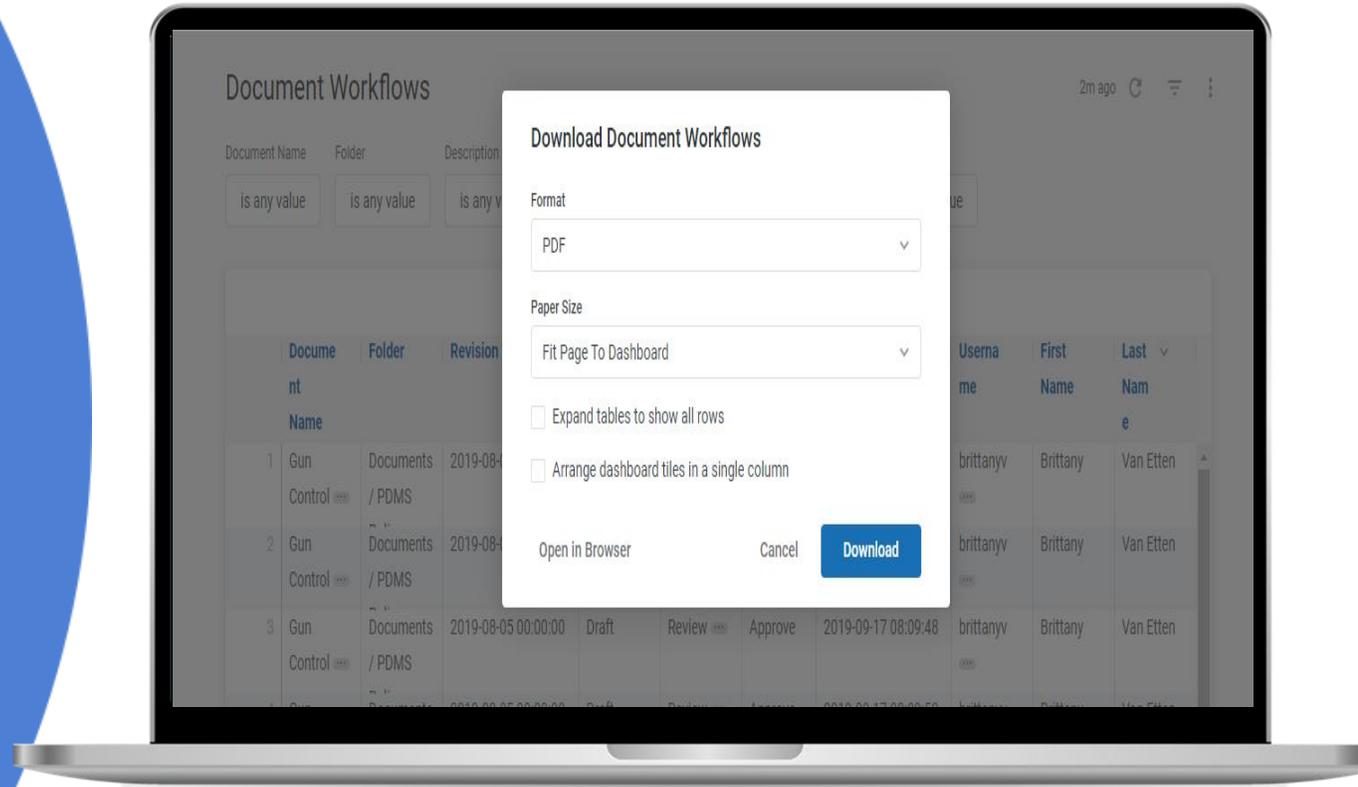
- Once you select the report/dashboard, click the three-dot icon in the upper right corner of the screen and select schedule delivery.
- Navigate through the three tabs settings, filters and advanced options to set up your timing, filtering options and any other applicable options.



PowerDMS

Downloading Report

- Once you select the report/dashboard, click the three-dot icon in the upper right corner of the screen and select Download.
- Choose your format, paper size and apply additional criteria
- Note: Always Click box to expand tables to show all results (1000 limit within web app)



Scenario 1:

You are a new PowerDMS administrator and are unsure what privileges your users have in PowerDMS. What Dashboard or Report should you use?



Scenario 1 Resolution:

Navigate to Analytics in PowerDMS>Click Users and Groups>Click Privileges Overview in the Dashboard section



Scenario 2:

You have an end user indicating they are receiving alerts for items that need to be completed in PowerDMS but said they have nothing to do. What report can you run to verify what to-dos users have?



Scenario 2 Resolution:

Navigate to Analytics in PowerDMS>Click Users and Groups>Click User inbox and apply filtering criteria (username)



Scenario 3:

You are maintaining accreditation for your organization and need a proof that to verify all signatures that were collected on a specific policy between January 1st and December 31st of 2021. Which report and filters can you apply for this information?



Scenario 3 Resolution:

Navigate to Analytics in PowerDMS>Click Documents>Signatures Summary>Apply filters for signed, the document name and signed on date.



Scenario 4:

You are maintaining accreditation for your organization and need a proof that to verify all signatures that were collected on a specific policy between January 1st and December 31st of 2021. Which report and filters can you apply for this information?



You should now be able to:

- Access Analytic Reports and Dashboards.
- Apply filters to reports.
- Automate reporting via email for your organization.
- Download or export data.



Support Resources

PowerDMS Support Team: 1-888-959-5158 or support@powerdms.com

Success Community Articles:

- [PowerDMS Analytics](#)
- [Filtering Reports](#)
- [Scheduling & Sending Reports with Analytics](#)





Questions?