PowerDMS

Assignments vs Security

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Objectives

In this session, you will learn:

- How to define the differences between assignments and security.
- How to differentiate the various levels of security.
- How to set content assignments while leveraging Best Practices.
- How to leverage both assignments and security to ensure correct access to content.

A few things to note:

- This session is being recorded.

- The recording will be automatically e-mailed to all registrants of this session as soon as it becomes available.

- **You can and should** download a copy of this presentation from that Handouts section of the GoToWebinar sidebar.

- You can type in your questions at any time within the questions field of the GoToWebinar interface.
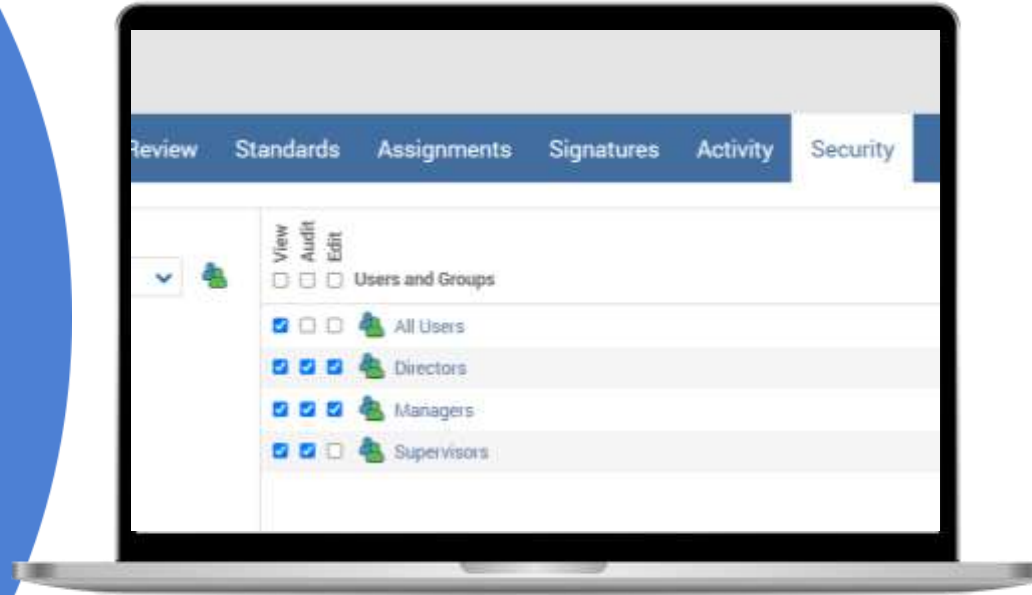
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What is security?

Put simply – the level of access that users have to your content.

The "Security" tab located on any piece of content within PowerDMS will show you which users/groups have access to that content and what level of access they have been given. This is also where you would edit those permissions.

Important details...

✓ There are 3 levels of Security:
  ➤ View allows access for seeing published content.
  ➤ Audit allows access to reporting information.
  ➤ Edit allows full access and the ability to adjust the content.

✓ Audit and Edit rights can only be used in conjunction with Administrator Privileges.
  ➤ If an end user (non-admin user) is given Audit or Edit rights to content, it will not do anything for them.

Important details...

✓ Some content will only show Audit and Edit as options under Security.

  ➢ Tests, Surveys, and Certificates will only provide you with the option of giving Audit or Edit rights to users.

  ➢ Users are not assigned courses, they are *enrolled* in them. For more information on this, please feel free to enroll in our October 2021 webinar – PowerDMS Courses: Managing the Details

✓ You will sometimes see a checkbox for "Cascading".

  ➢ You will see this option when giving access to Folders or Groups (objects that can hold other objects within them).

  ➢ This allows for what we call the "trickle down effect".

  ➢ Ex. : Giving a user Audit Cascading to a Folder allows that user to audit the folder and all the contents of that folder.
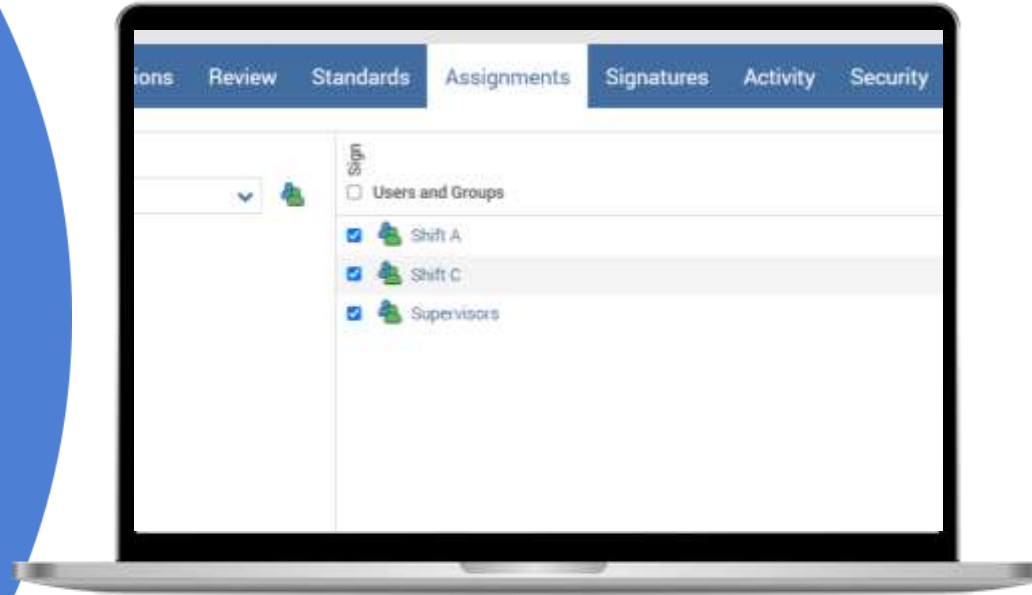
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What are assignments?

Action items to be completed by users.

When we assign something to users/groups, the system will put that item into their inbox as an item to be completed. In PowerDMS, we can assign Documents, Tests, Surveys, and Certificates.

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Sworn
▸ Captains
▸ Detectives
▸ Lieutenants
▸ Officers
▸ Sergeants

What's the Best Practice?

Always leverage a group when assigning users to complete something or when providing security permissions to content in your site.

Using Assignments and Security in Tandem

Example Time!

Example #1

We want our Officers to sign off on our Use of Force policy and also be able to refer to the policy whenever they'd like to.

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Steps:

1. Navigate to the document in PowerDMS

2. Click on Manage Document

3. Click on the Assignments tab

4. Add "Officers" here and hit Save

5. Click on the Security tab

6. Add "Officers" here with View rights and hit Save

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Example #2

We want our Officers to be able to see the entire Policies folder, but they only need to sign off on the first three documents in that folder.

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Steps:

1. Find the Policies folder in the blue sidebar on the left, hover over it and the three dots, and then hit Manage

2. Click on the Security tab

3. Add "Officers" here with View Cascading rights and hit Save

4. Navigate to the first document in the Policies folder

5. Click on Manage Document

6. Click on the Assignments tab

7. Add "Officers" here and hit Save

8. Repeat for the next two documents

Example #3

We need our Officers and Sergeants to take a test. We also want our Sergeants to be able to run reports on the test, but they should only see test information for the Officers, not the Sergeants.

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Steps:

1. Navigate to the test in PowerDMS
2. Click on the Assignments tab
3. Add both "Officers" and "Sergeants" here and hit Save
4. Click on the Security tab
5. Add "Sergeants" here with Audit rights and hit Save
6. Navigate to the "Sergeants" group in the blue sidebar and Manage it
7. Click on Rights and Assignments
8. Check the box for Create Rights to Reports and hit Save
9. Navigate to the "Groups" tab located underneath "Rights and Assignments"
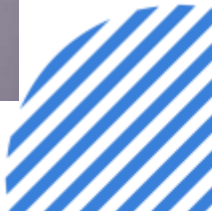10. Add "Officers" here with Audit Cascading rights and hit Save

You should now know:

- ✓ How to differentiate assignments and security.
- ✓ How to define and configure the different levels of security.
- ✓ How to set assignments to documents and training content.
- ✓ How to correctly use both assignments and security to ensure correct content access.

Support Resources

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

PowerDMS University Courses:

Self-Paced:
    Creating Groups and Managing Security

Boot Camp: Administration (ILT)

Self-Paced:
    Uploading and Managing Documents in PowerDMS

Boot Camp:

    Document Management (ILT)

    Document Signatures and Workflows (ILT)

ILT: Instructor Led Training (Virtual Classroom)

Success Community Articles:

Creating Groups

Security in a Nutshell

User Security and Permissions

Assigning Documents for Signature