



# Managing Document Revisions

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## 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 GoToWebinar interface.



# Objectives

This session will ensure you understand

- PowerDMS Document Best Practices
- How to properly maintain a document lifecycle
- Important data points that should be maintained to support reporting
- Where to identify the audit trail of a document




# What's the Best Practice?

PowerDMS tracks the entire "lifecycle" of a document as soon as it is uploaded to your site.

Documents can exist in one of three states: drafts, published, and archived versions.

PowerDMS maintains the information of each of these states, along with any associated workflows, or signatures from your employees that are attached to each state.



# States of a document

## Draft

Initial state your document exists in, as soon as it is uploaded to the site.

Indicates that specific version of the document may not be ready for viewing/reference by end users within the site.

Requires Audit +/- Edit permissions over the document to be visible to an administrator.

## Published

State the document is required to be in to be visible to an end user with view rights to the document.

Signatures can only be obtained on published versions of the document. With each revision, a new signature acknowledgement record can be captured.

Requires Edit permissions over the document to place it in a published state.

## Archived

State the document exists in, when a newer version of the document is published for users to reference.

Archived versions of a document are only available to administrators.

Requires Audit permissions over the document to view archived versions.  
Requires Edit permissions over the document to be moved into an archived state.



Version 1 from  
2019  
(Archived)

Version 2 from  
2020  
(Archived)

Version 3 from  
2021  
(Current Publication)

Each version of the document maintains separate, relevant data as individual records but displays as a singular record for end users.

- The documents historical versions are hidden in the background for administrators only.
- The published version is the only version made available for reference to end users.

## Document Lifecycles can be fluid in direction.

Draft

Draft to Publish: Document is ready for viewing.

Publish  
d

Draft to Archive: Document version is no longer relevant or needs to be maintained as a historical record

Archive  
d





## Document Lifecycles can be fluid in direction.

### Draft

Publish to Draft: New version of the document is being developed.

### Publish

Publish to Archive: Document version is no longer relevant, and a new version has been made available.

This is done automatically.

### Archive

### d



## Document Lifecycles can be fluid in direction.

# Draft

Archive to Draft: Older version of a document can be restored to develop a new version of the document, without having to be fully recreated.

# Published

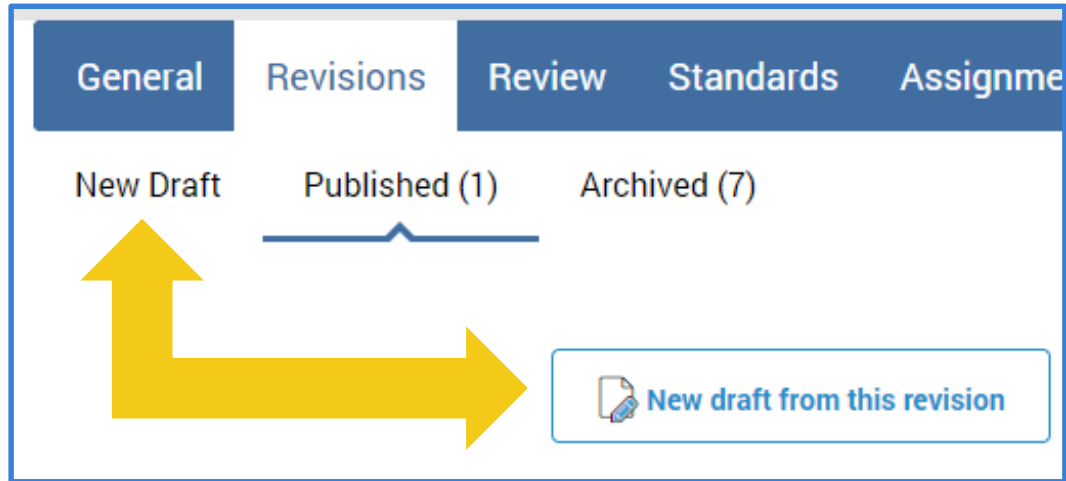
Archive to Publish: Document version is the most accurate and needs to be made visible to end users.

# Archived



# How do I establish a new version of an existing document?

## New Draft vs New Draft from this revision



# How do I establish a new version of an existing document?

## New Draft

Allows you to upload a new version of the document for use in your PowerDMS site.

- New version was already created with necessary changes outside of PowerDMS.
- New format of document, changes need to be created within PowerDMS.

## New Draft from this revision

Allows you to leverage the existing publication in your PowerDMS site to begin making the necessary iterations.

Requires use of the PowerDMS Author Tool to make changes.

Both options allow you to maintain an accurate record of your document history throughout its presence in your PowerDMS site.

# Relevant Data Points



Effective Date – Maintains the same date for all document versions present in your PowerDMS site.

Revision Date – Automatically updates with each new revision added or created (New Draft or New Draft from this revision) within your PowerDMS site.

\*These dates can support and/or hinder reportable data in your site. You are encouraged to update an effective date and last revision date when the document is initially uploaded to PowerDMS.

# Exception to the Rule

## Not recommended

- Mandates (County, State, National Levels) may require documents be destroyed after a specific window of time.
  - ✓ In these unique circumstances, please reach out to your Customer Success Manager to receive support of best methods to manage your document revisions.



# Where's the Audit Trail?

While managing the document, via the Revisions tab, you can identify and view archived versions, along with relevant preliminary information.

General Revisions Review Standards Assignments Signatures Activity Security								
New Draft			Published (1)			Archived (8)		
		Revision Date	File Type	Revision Comments	Attached Test	Last Modified By	Signatures	Last Published
✎	📄	11/11/2021	📄 docx			Amanda Bradford	0	Never
✎	📄	9/14/2021	📄 docx			Marelena Cruz	0	9/27/2021
✎	📄	9/1/2021	📄 docx			Marelena Cruz	0	Never
✎	📄	8/31/2021	📄 docx			Marelena Cruz	0	8/31/2021
✎	📄	8/17/2021	📄 docx			Marelena Cruz	0	8/17/2021
✎	📄	3/15/2021	📄 docx			Brittany Van Etten	0	Never
✎	📄	8/31/2020	📄 docx			Maggie Young	0	Never
✎	📄	2/1/2020	📄 docx			Amy Riggs	1	3/18/2019

# Where's the Audit Trail?

While managing the document, on the Activity tab, you can identify more details associated with the document's full history. You can export information from this view.

The screenshot displays the 'Activity' tab in a document management system. The top navigation bar includes tabs for General, Revisions, Review, Standards, Assignments, Signatures, Activity (selected), and Security. Below the navigation bar, there are filters for 'Activity Types' (set to 'All Types') and 'User' (set to 'All Users'), along with a date range selector and 'Search' and 'Reset' buttons.

A yellow arrow points from the 'Activity' tab in the top navigation bar to the 'Activity Types' dropdown menu in the detailed view. The 'Activity Types' dropdown is open, showing a list of activity types with checkboxes. The 'Revision Created' option is selected.

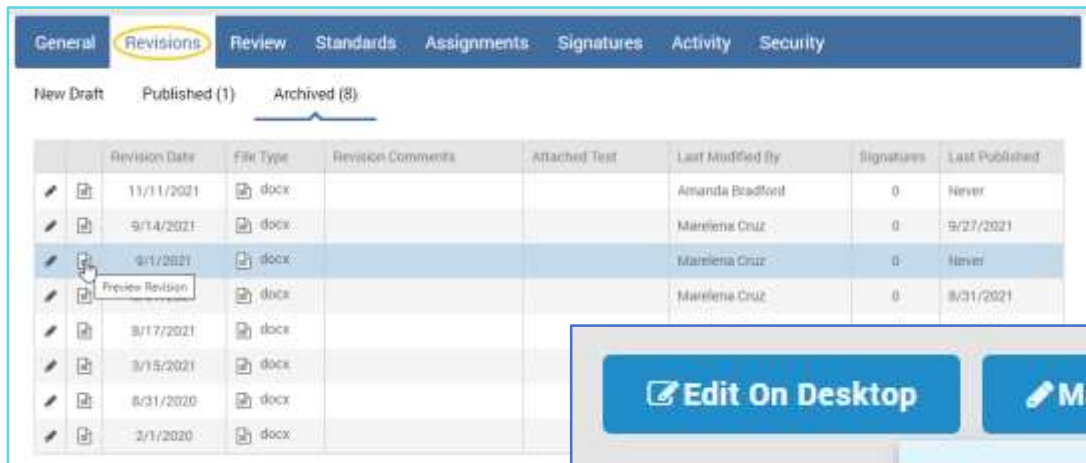
The detailed view shows a table with columns for 'User', 'Activity', 'Revision Date', 'Status', and 'Details'. The table contains two rows of data:

User	Activity	Revision Date	Status	Details
Amanda Bradford	Revision Status Change	/11/2021 2:54 PM	Status changed from: Draft to Archive	
Amanda Bradford	Revision Created	/11/2021 2:54 PM		

In the bottom right corner of the detailed view, there are three export icons (CSV, PDF, and Print) circled in yellow.



# Comparing Versions

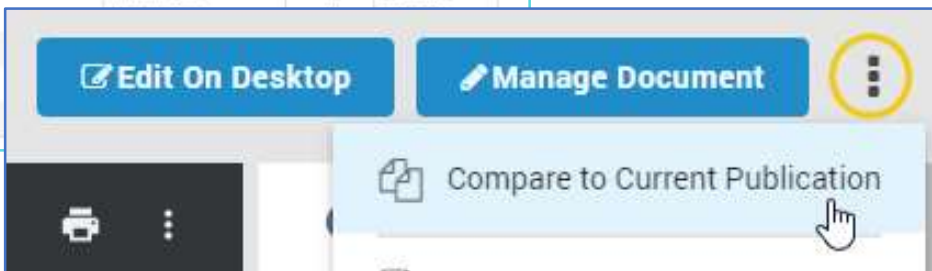


	Revision Date	File Type	Revision Comments	Attached Test	Last Modified By	Signatures	Last Published
	11/11/2021	docx			Amanda Bradford	0	Never
	9/14/2021	docx			Marelena Cruz	0	9/27/2021
	9/1/2021	docx			Marelena Cruz	0	Never
	Preview Revision	docx			Marelena Cruz	0	8/31/2021
	8/17/2021	docx					
	3/15/2021	docx					
	8/31/2020	docx					
	2/1/2020	docx					

Select the page icon associated with the archived version you'd like to compare against the current publication.

Once viewing the archived version, use the 3-dot menu to compare.

You'll see a side-by-side comparison of the two documents with highlights to further identify the differences in both documents.



A person wearing a dark blue suit and a light blue shirt is holding a white rectangular sign with both hands. The sign has the word "QUESTIONS?" written on it in a bold, dark blue, sans-serif font. The person's hands are visible, and they are holding the sign in front of their chest. The background is a plain, light grey color.

**QUESTIONS?**

# Support Resources

PowerDMS Support Team: 1-888-959-5158 or [support@powerdms.com](mailto:support@powerdms.com)

PowerDMS University Courses:

Self-Paced:

Uploading and Managing Documents in PowerDMS

Boot Camp:

Document Management

Success Community Articles:

[Policy Best Practices](#)

[Anatomy of a Document](#)

[Revising and Republishing Documents](#)

[PowerDMS Author](#)

