PowerDMS®

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State the document exists in, when a newer version of the document is published for users to reference.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

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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.

Version 1 from 2019 (Archived)

Version 2 from 2020 (Archived)

Version 3 from 2021 (Current Publication)

Draft

Document Lifecycles can be fluid in direction.

Draft to Publish: Document is ready for viewing.

Published

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

Archived

Draft

Document Lifecycles can be fluid in direction.

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

Published

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

This is done automatically.

Archived

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Document Lifecycles can be fluid in direction.

Draft

Published

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.

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

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.

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.

Comparing Versions

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.
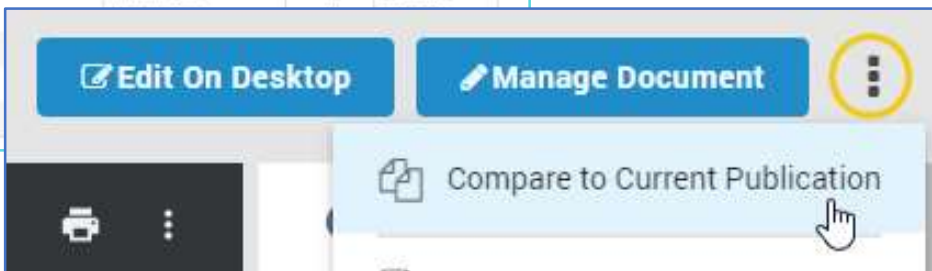
Support Resources

PowerDMS Support Team: 1-888-959-5158 or 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