

# PowerDMS®

## Creating and Managing User Profiles

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- You can type in your questions at any time within the questions field GoToWebinar interface.



# Today's Objectives

In this session, you will learn:

- How to manually create a user profile
- How to automate removal of a profile when temporary
- How to locate archived user profiles
- How to utilize user profile features to manage the user

# Amanda Bradford

**Training Specialist II &  
Certified Professional Program Coordinator**





# You should already...

Be familiar with PowerDMS Security Definitions

**View** = lowest level of security and allows users to see the content

**Audit** = mid-level security and grants users access to content records (reporting)

**Edit** = highest level of security and grants users the ability to create, make changes and even delete content



# Create a User

New ▾Help ▾

Message

Document

Certificate

Course

Test

Survey

User

Group

Standards Manual

Assessment

Training Request

New User

General

Membership

Documents

Certificates

Courses

Tests

Surveys

Standards

Workflows

Security

Information

Contact

Files

Required information is marked with an asterisk

?

Choose Picture

\* First Name: Elizabeth

Middle Name:

\* Last Name: Witt

Email: ewitt@email.com

\* Username: ewitt

Password:

Job Title:

Location:

Password Exp Days:

Password Exp Date:

Start Date:

End Date: 4/29/22

Inbox Sign All:

☐

This will automatically be unchecked after the user has used this feature.

Send Welcome Email:

☐

Sends user an initial login link to set their own password.

Save

Save & New

# PowerDMS Tip #1

## Username Considerations

- ✓ Be consistent across all users if possible
  - Will make it easier to easily reference/identify
  
- ✓ Using an identifier that won't change
  - Employee ID number



# Create a User

New User

General

Membership

Documents

Certificates

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Tests

Surveys

Standards

Workflows

Security

Information

Contact

Files

?

Choose Picture

\* First Name:

Elizabeth

\* Last Name:

Witt

\* Username:

ewitt

Job Title:

Password Exp Days:

Start Date:

Inbox Sign All:

☐

This will automatically be unchecked after the user has used this feature.

Send Welcome Email:

☐

Sends user an initial login link to set their own password.

Middle Name:

Email:

ewitt@email.com

Password:

Location:

Password Exp Date:

End Date:

4/29/22

Save

Save & New

Utilize an email address to support use of alert notifications and password resets. Should be input to the profile at the initial creation of the user.



# Create a User

New User

General

Membership

Documents

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Standards


Workflows

Security

Information

Contact

Files



Choose Picture

\* First Name: Elizabeth

\* Last Name: Witt

\* Username: ewitt

Job Title:

Password Exp Days:

Start Date:

Inbox Sign All: 

This will automatically be unchecked after the user has used this feature.

Send Welcome Email: 

Sends user an initial login link to set their own password.

Middle Name:

Email: ewitt@email.com

Password:

Location:

Password Exp Date:

End Date: 4/29/22

Save

Save & New

Remaining fields are optional but can fully support relevant information for the user.

See Support Resources Slide for related articles.

## PowerDMS Tip #2

### Archive users when...

- You may have exceeded your license count
- A users will not be logging into PowerDMS on a temporary basis
- Users leave your agency



# Automating the Archive of a User

Utilizing the End Date when creating the user profile supports the automation of archiving the user profile.

Beneficial for temporary access needs:

Mock/Final Assessors/Auditors for Accreditation

Temporary or Short-Term Employees


Removes need for further administrative intervention!


Middle Name:

Email:

Password:

Location:

Password Exp Date:  

End Date:  

User will automatically be archived on this date!

# Manually Archiving a User

astecher - Aleksandra Stecher

✉

View Profile

GeneralMembershipDocumentsCertificatesCoursesTestsSurveysStandardsWorkflowsSecurity

InformationContactFiles

Choose Picture

First Name:

Aleksandra

Middle Name:

Last Name:

Stecher

Email:

astecher@test.com

Username:

astecher

Password:

\*\*\*\*\*

Job Title:

Captain

Location:

Password Exp Days:

0

Password Exp Date:

Start Date:

End Date:

Inbox Sign All:☐ This will automatically be unchecked after Aleksandra Stecher has used this feature.

Save

Save & New

Deactivate & Archive

Archiving preserves the users records in PowerDMS.  
We never suggest a user is deleted.

# Adding Contact data to User Profiles

GeneralMembershipDocumentsCertificatesCoursesTestsSurveysStandardsWorkflowsSecurity

InformationContactFiles

Personal information can be maintained here

Address:101 S. Garland AveCity:Orlando

State:FloridaZip:32801

Extension:

Phone #/Type/Notes:14079927089Cell

Phone #/Type/Notes:14077360196Robert Witt- Emergency Conta

Phone #/Type/Notes:

Other Notes data is referenceable when evaluating users via the Mobile App.

Other Notes:952 remainingTemporary EmployeeRobert Witt- Emergency Contact (Spouse): 14077360196

SaveSave & CloseCancel

# Adding Files to User Profiles

sampleuser - Sample User

General Membership Documents Certificates Courses Tests Surveys Standards

Information Contact **Files**

Browse For File(s) **Browse**

Add files to a user's profile to keep important user documents, licenses, or images in a single location

sampleuser - Sample User [View Profile](#)

General Membership Documents Certificates Courses Tests Surveys Standards Workflows Security

Information Contact **Files**

Browse For File(s) **Browse**

File Name	Description	Uploaded By	Upload Date	
professional license.pdf	Professional License	admin admin	2/15/2019 12:53 PM	

**Save**

sampleuser - Sample User

General Membership Documents Certificates Courses Tests Surveys Standards

Information Contact **Files**

This file is "pending" upload...

Professional License.pdf **Upload**

PowerDMS limits access to those files to people with Edit rights to the user



# User Membership

- ✓ Identifies all groups the user profile is associated with.
- ✓ PowerDMS has already set for the ALL USERS group to capture/establish every new user as a member of this group.
- ✓ All Users is intended to be a “catch all” group for all employees of the organization that have access to the PowerDMS site.


The screenshot shows the user profile for Elizabeth Witt (ewitt). The 'Membership' tab is selected and highlighted with an orange border. Below the tabs, a note states: "Note: Membership cannot be modified for groups linked to a job title or location". On the left, there is a section for adding groups with a dropdown menu, an 'Add' button, and a 'Filter' link. On the right, under the 'Member' heading, there are two options: 'Groups' (unchecked) and 'All Users' (checked with a blue checkmark). An orange arrow points from a text box to the 'All Users' option.

ewitt - Elizabeth Witt [View Profile](#)

General **Membership** Documents Certificates Courses Tests Surveys Standards Workflows Security

Note: Membership cannot be modified for groups linked to a job title or location

▼ Add Groups




Add

► Filter

Member

☐ Groups

☒  All Users

All Users Group is default set to add any new user created to the group (regardless of the manner by which they are created).

# User Membership

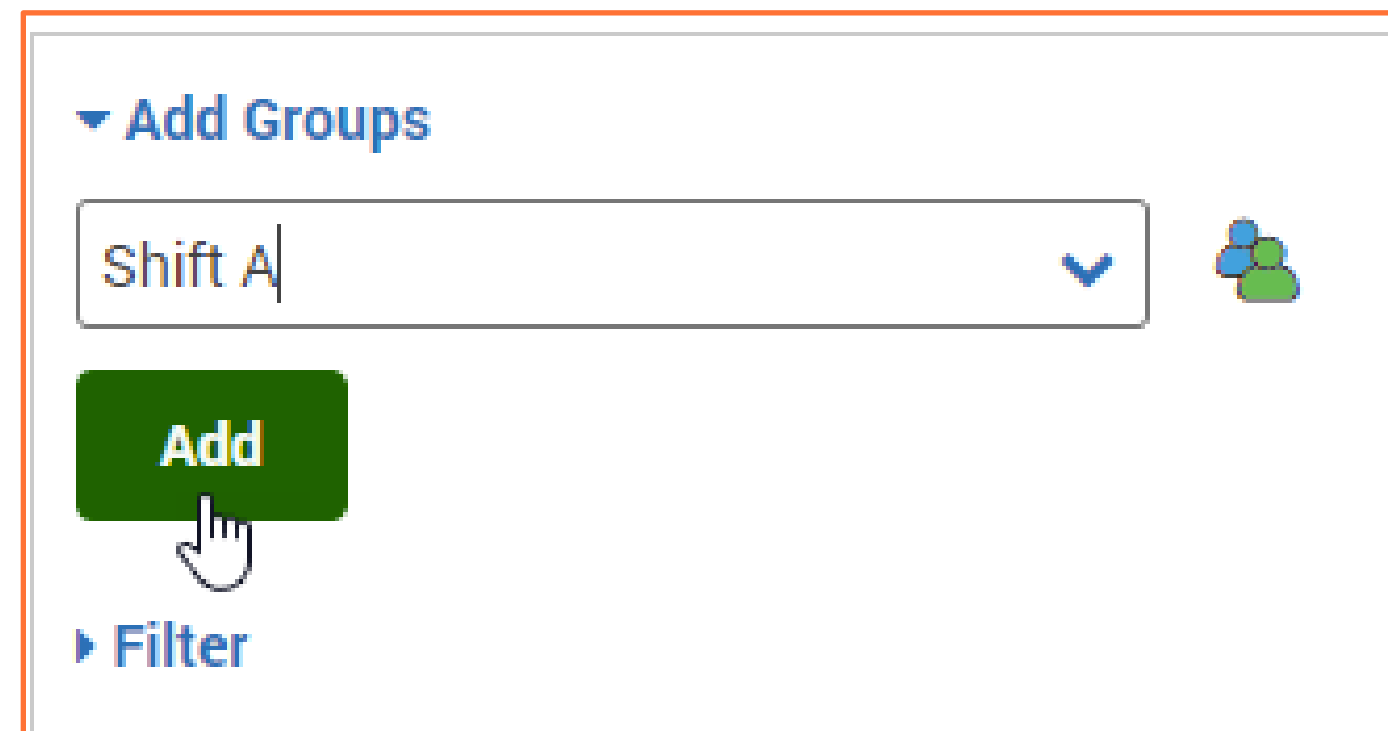
When creating the user profile initially, this is a quick way to assign the user to relevant groups they should be a part of.

Use Add Groups field to locate relevant groups user should be a member of and select Add.

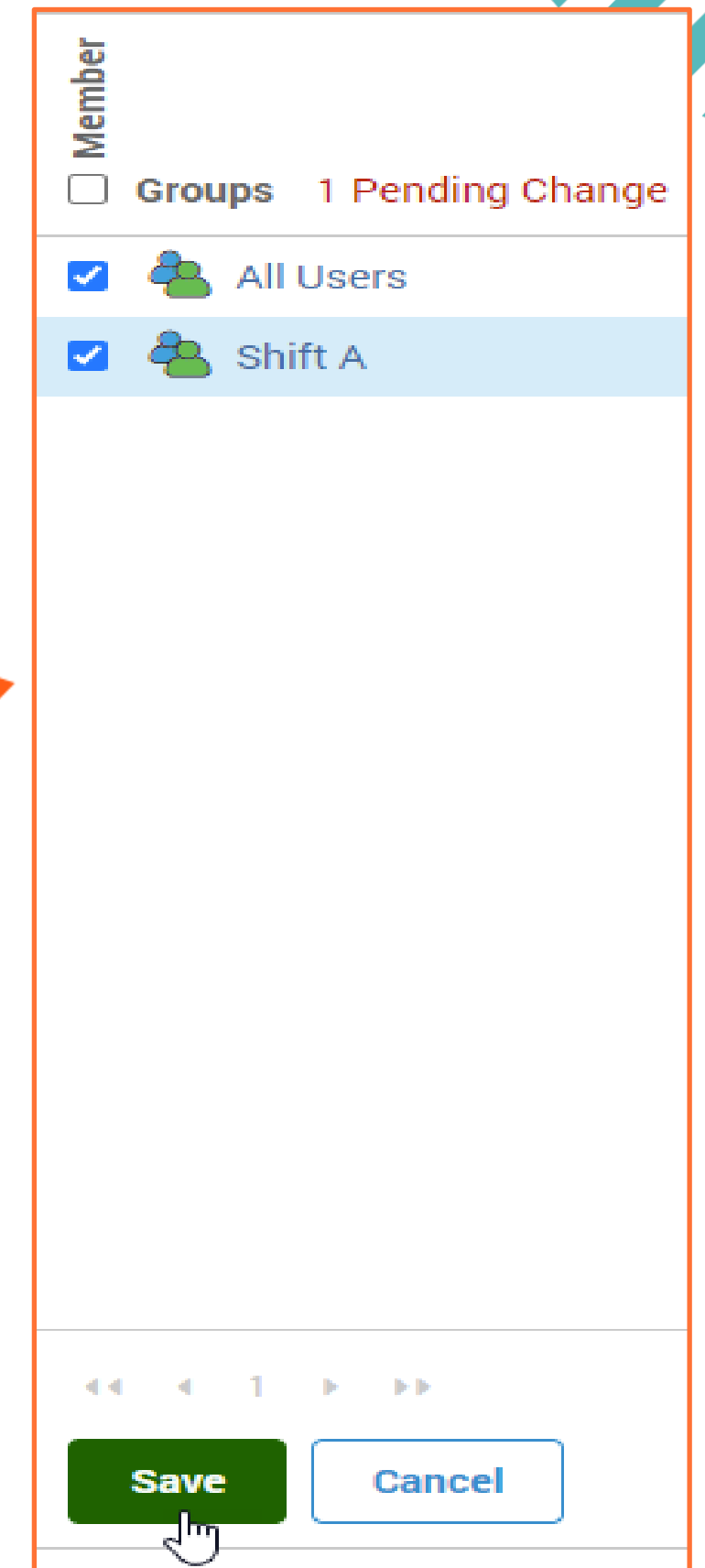
Once added, groups will populate on the right-hand view to confirm membership to be established, select Save.

Note:

Users can belong to multiple groups. Access to content is defined within the group permissions and layered for user access.

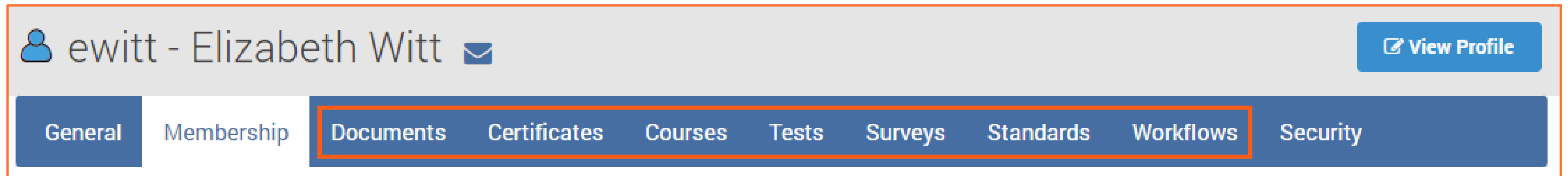


A screenshot of the 'Add Groups' field in the user membership interface. The field is a text input with a dropdown arrow and a group icon. The text 'Shift A' is entered. Below the field is a green 'Add' button with a hand cursor pointing to it. Below the 'Add' button is a blue 'Filter' link.





A screenshot of the 'Member' panel in the user membership interface. The panel has a title 'Member' and a section 'Groups' with a status '1 Pending Change'. Below this, there is a list of groups: 'All Users' and 'Shift A'. Both groups are checked with a blue checkmark. At the bottom of the panel, there are 'Save' and 'Cancel' buttons. A hand cursor is pointing to the 'Save' button.

# User Content and History



- ✓ Management tabs for content are maintained between Documents – Workflows.
- ✓ These tabs will help an administrator identify the active assignments for completion as well as completed assignments for the user.
- ✓ Maintains this data for the lifelong history for the user, even if/when the user is archived.

# User Security: Privileges

 ewitt - Elizabeth Witt  [View Profile](#)

[General](#) [Membership](#) [Documents](#) [Certificates](#) [Courses](#) [Tests](#) [Surveys](#) [Standards](#) [Workflows](#) **Security**

**Privileges** [This User](#)

☐ Administrator Privileges ☐ Enable Messaging



Administrative Rights

Create Rights

Messaging Rights

Follow the Best Practice

NOTE: Changes take effect upon login

 Given to the User  Inherited via a Group

[Save](#) [Cancel](#)

## What's the Best Practice?

- ✓ Always establish access or assignments to content through an appropriate **group** structure.
- ✓ Allows for efficient and consistent point of reference on where permissions are provided to a user.
- ✓ This Best Practice only has 1 exception: Master Administrators.
  - Master Administrator permissions should be set at the user profile level.





# User Security: This User

- ✓ Direct vs. Inherited Security permissions will display within this view.
- ✓ To adjust/modify permissions on an inherited security, you must navigate to the source of the permissions where they were directly established.
  - This is identified in parenthesis to the right of the permission and can be selected for quick navigation from the popup display provided.

ewitt - Elizabeth Witt [View Profile](#)

General Membership Documents Certificates Courses Tests Surveys Standards Workflows **Security**

Privileges **This User**

▼ Add Users Or Groups

☐ View  
☐ Audit  
☐ Edit  
[Add](#) [?](#)

View	Audit	Edit	Users and Groups
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	All Users (via All Users group)
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	abradford - Amanda Bradford
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	abradford - Amanda Bradford (via 3 Groups)

Rights/assignments are inherited from:  
All Users  
Employees by Shift  
Shift A

Direct security permissions are in bright color and can be adjusted within the same screen. Inherited security permissions are grayed out and cannot be adjusted.

# Today's Objectives

You should now know how to:

- Manually create a user profile
- Automate removal of a profile when temporary
- Locate and restore archived user profiles
- Utilize user profile features to manage the user

# Support Resources

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

## PowerDMS University Courses:

### Self-Paced:

Creating Groups and Managing Security

### University Live:

Creating Groups and Securities

## Success Community Resources:

- [Creating Users](#)
- [Security Definitions](#)
- [Linking Groups](#)
- [Resetting a User Password](#)
- [Archiving Users](#)
- [Restoring Users](#)

For organizations that use Active Director review:

- [PowerDMS Sync](#)
- [Syncing with an Active Directory](#)

