PowerDMS®

Creating and Managing User Profiles

Presenter: Amanda Bradford
trainingteam@powerdms.com

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.

Todays 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...

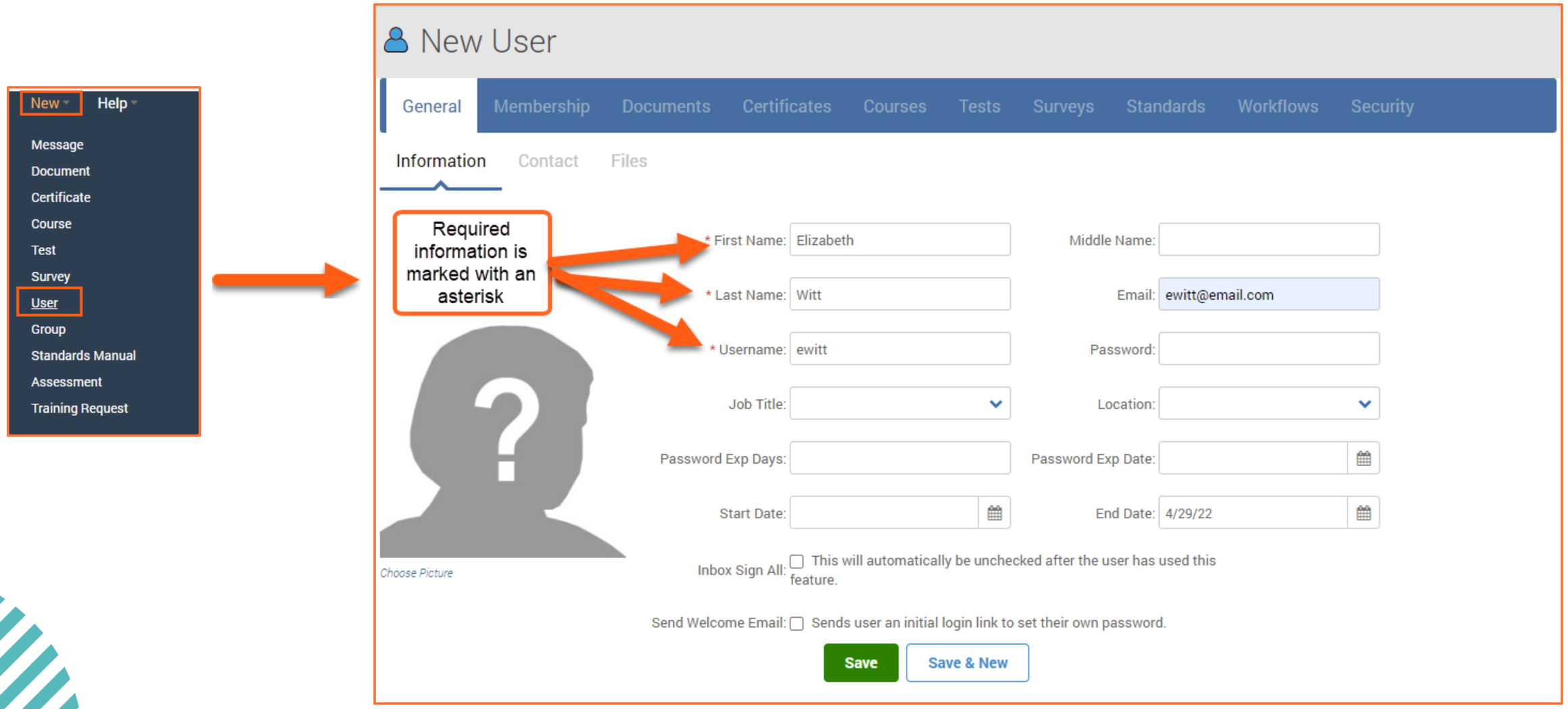
Be familiar with PowerDMS Security Definitions

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



PowerDMS Tip #1

Usernames Considerations

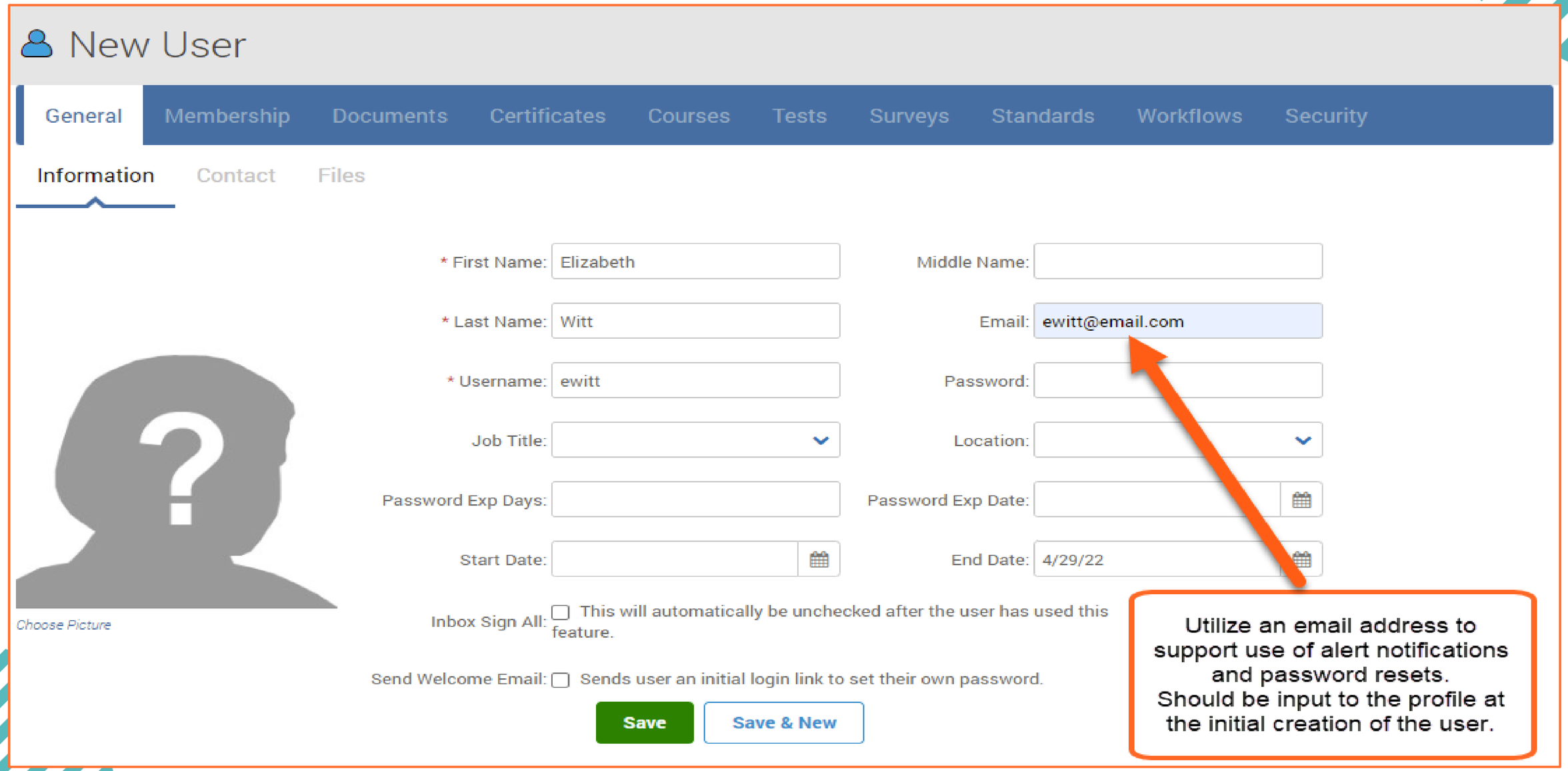
✓ Be consistent across all users if possible

- Will make it easier to easily reference/identify

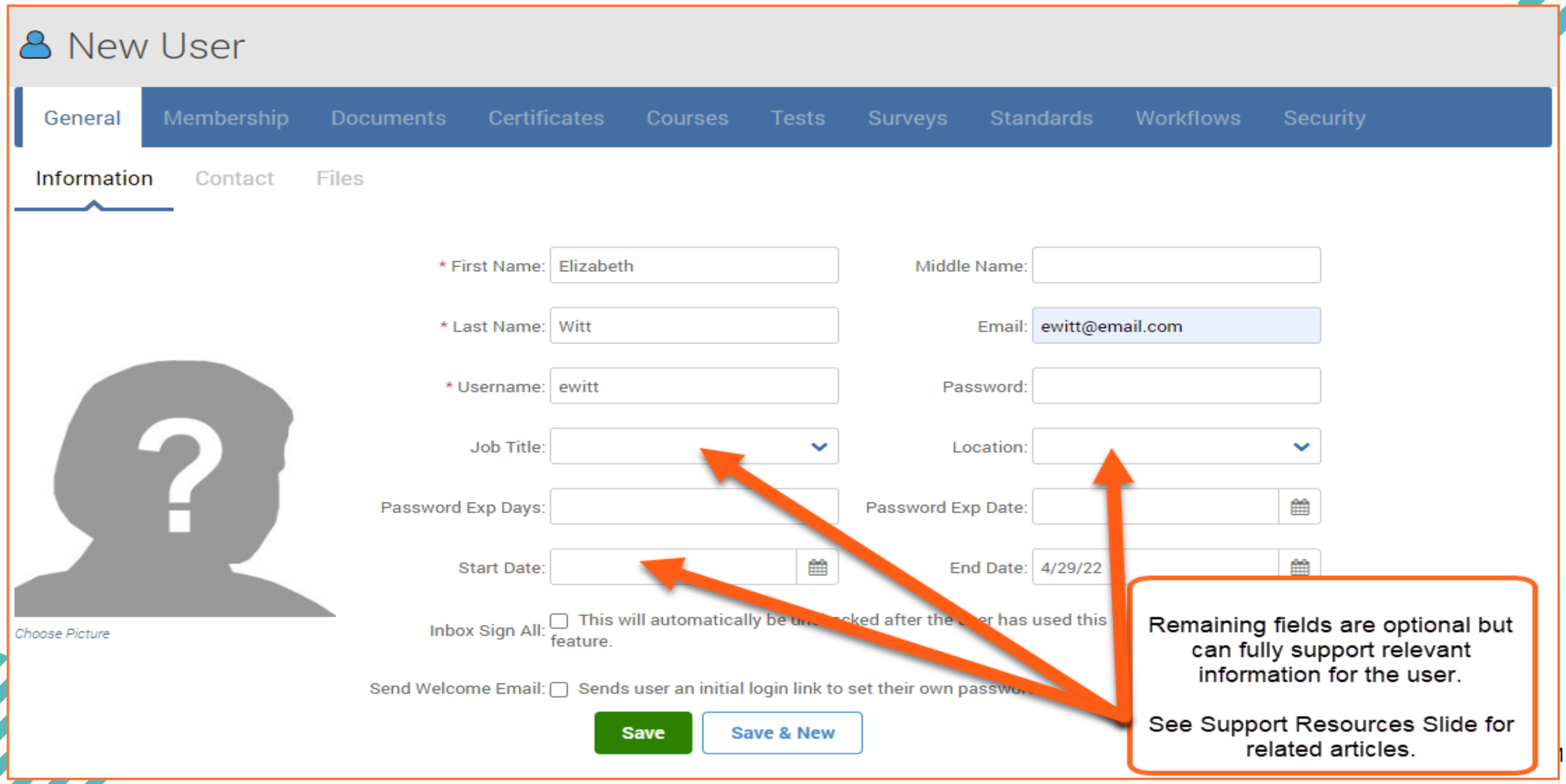
✓ Using an identifier that won't change

- Employee ID number

Create a User



Create a User



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

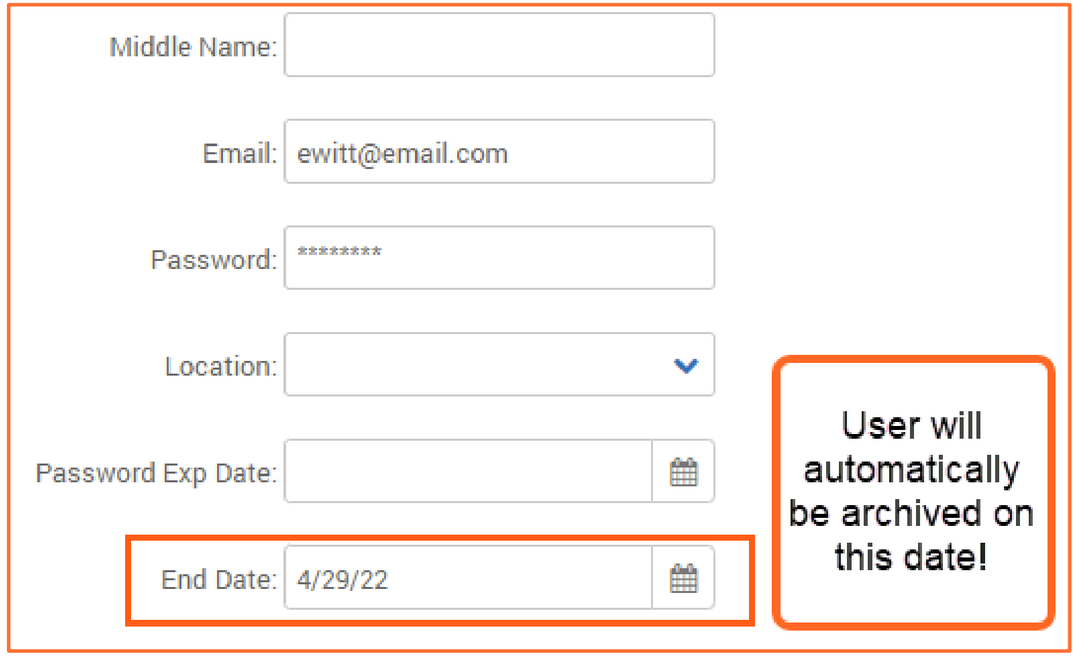
Automating the Archive of a User

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

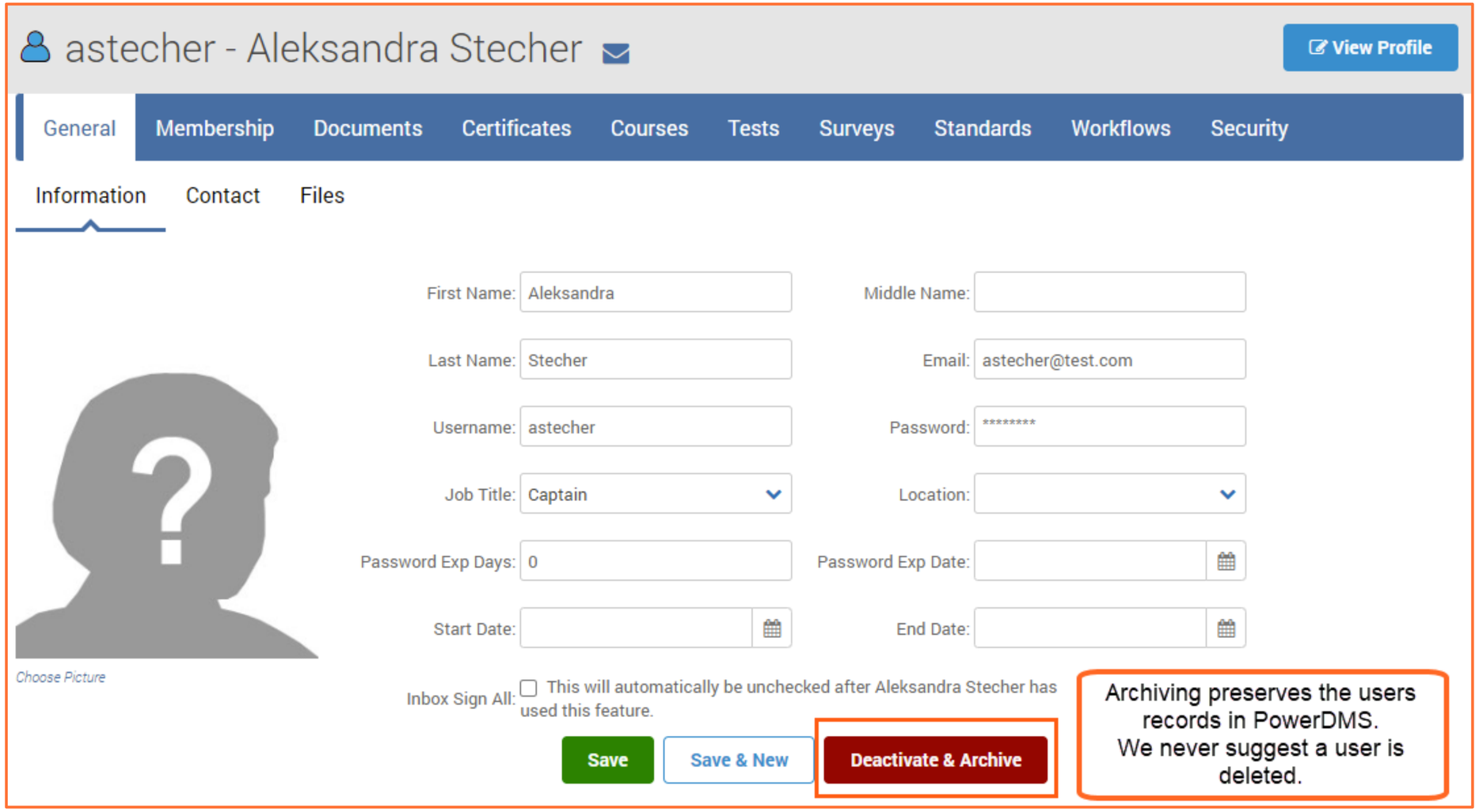
Beneficial for temporary access needs:

- Mock/Final Assessors/Auditors for Accreditation
- Temporary or Short-Term Employees

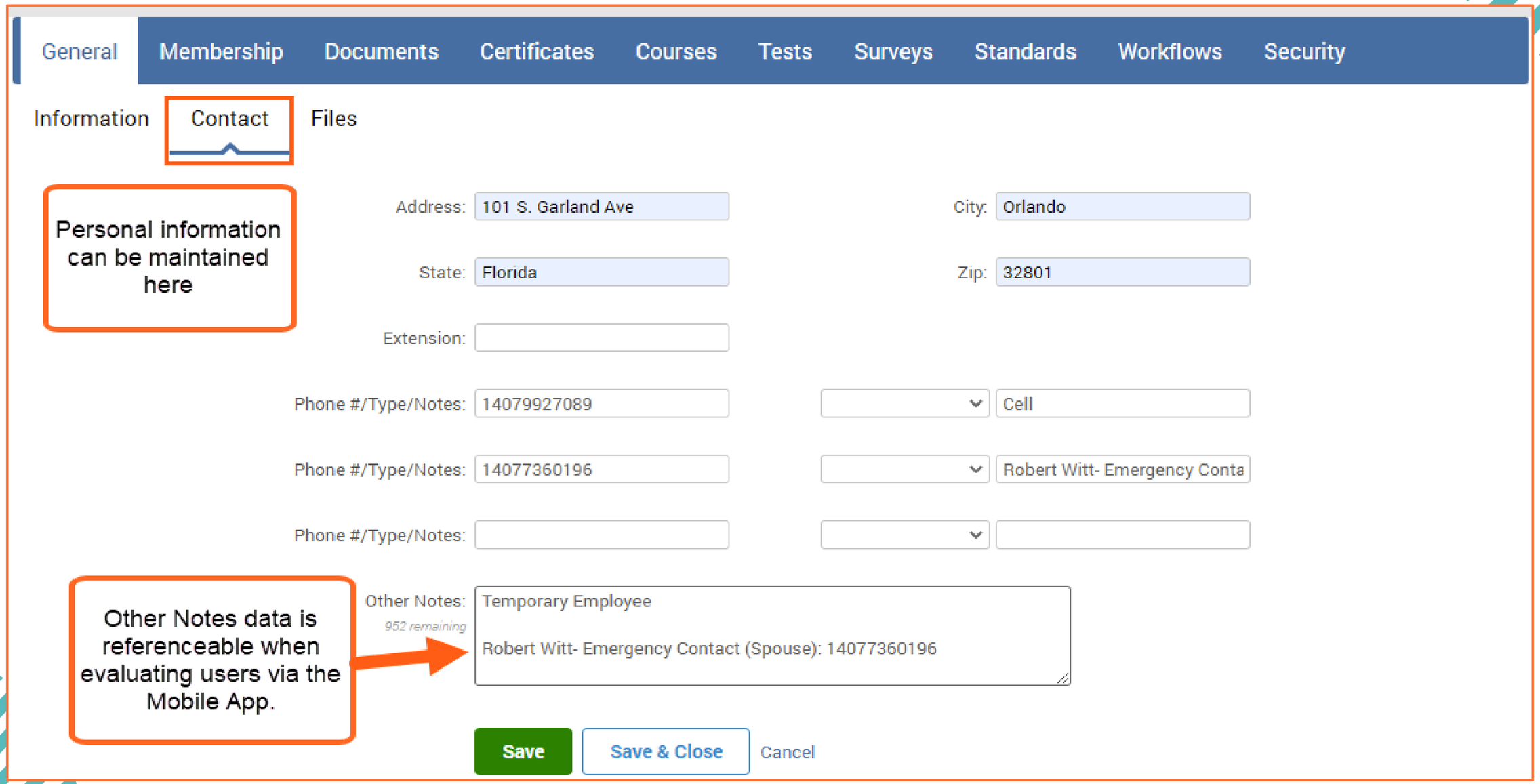
Removes need for further administrative intervention!



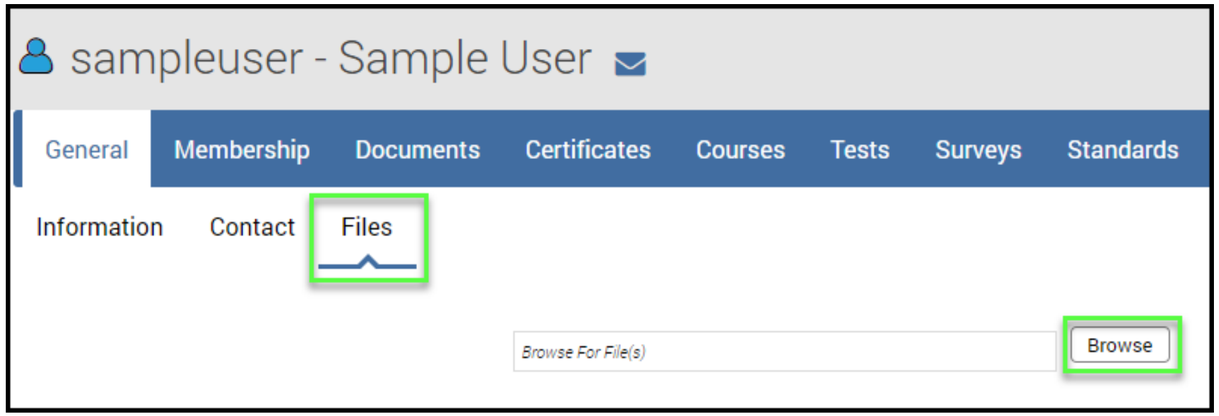
Manually Archiving a User



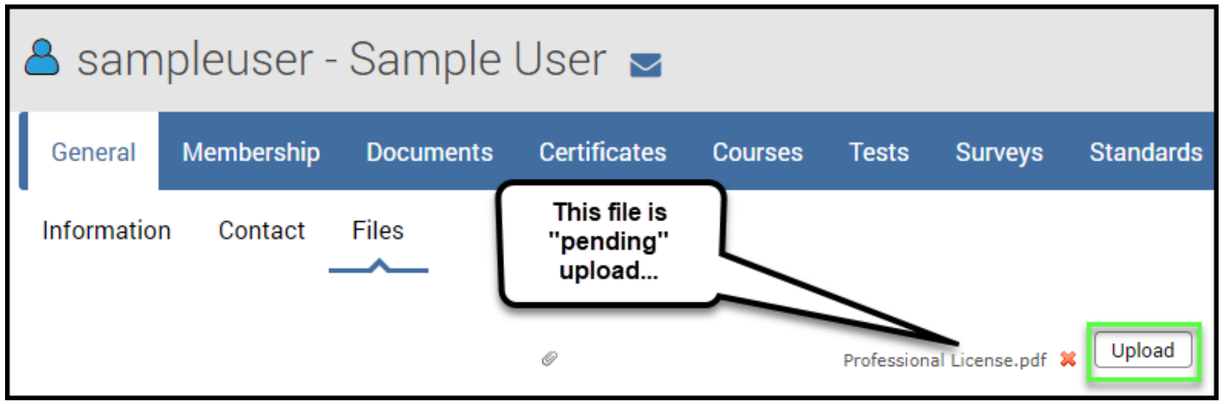
Adding Contact data to User Profiles

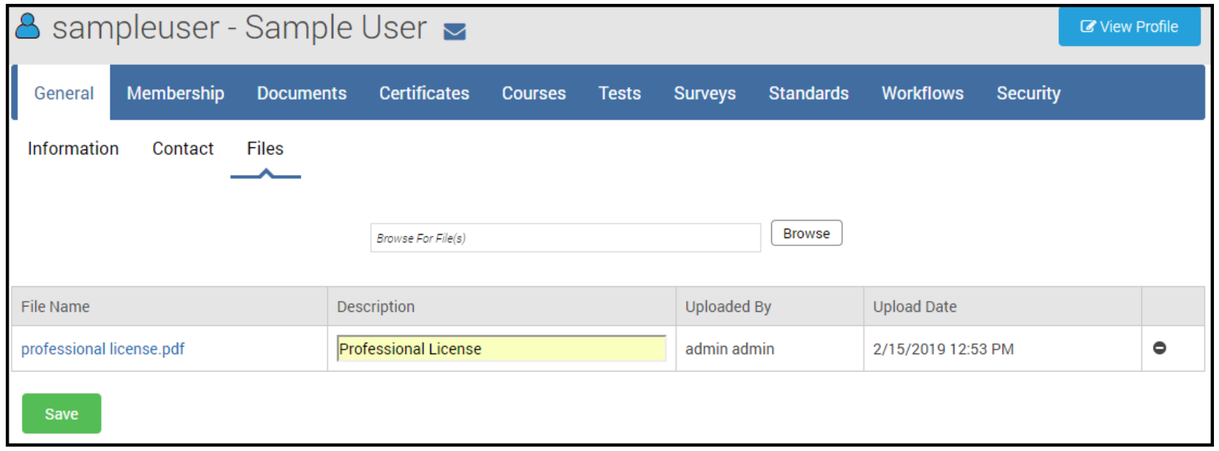


Adding Files to User Profiles



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

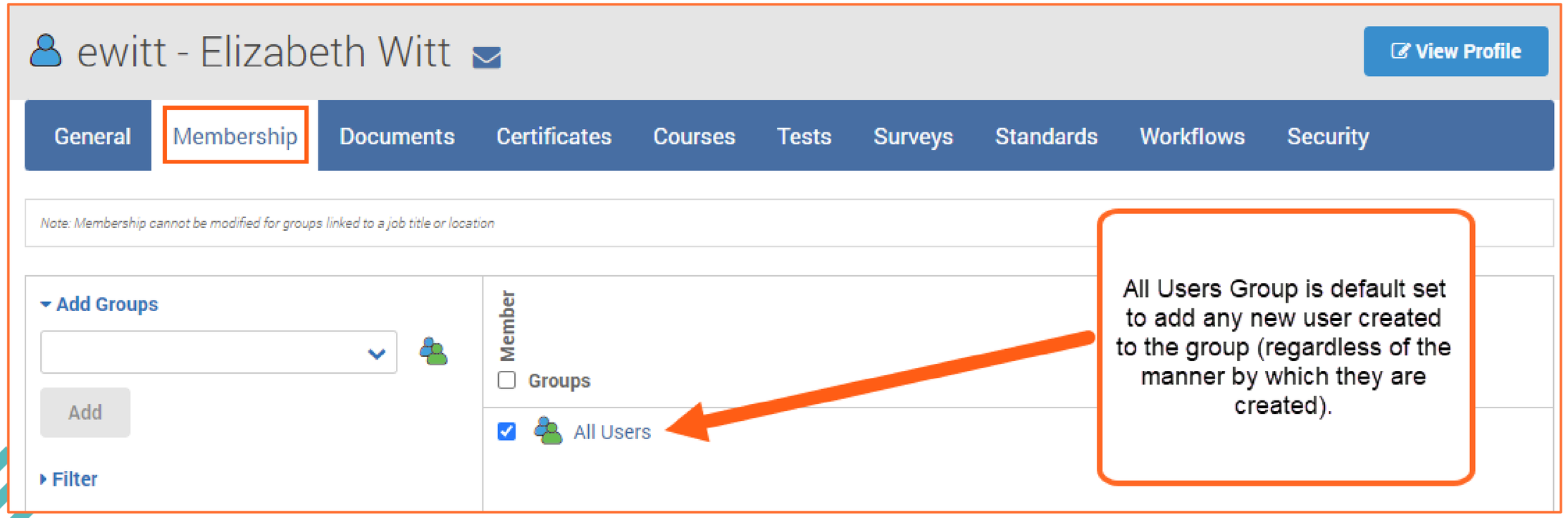




PowerDMS limits access to those files to people with Edit rights to the user

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.

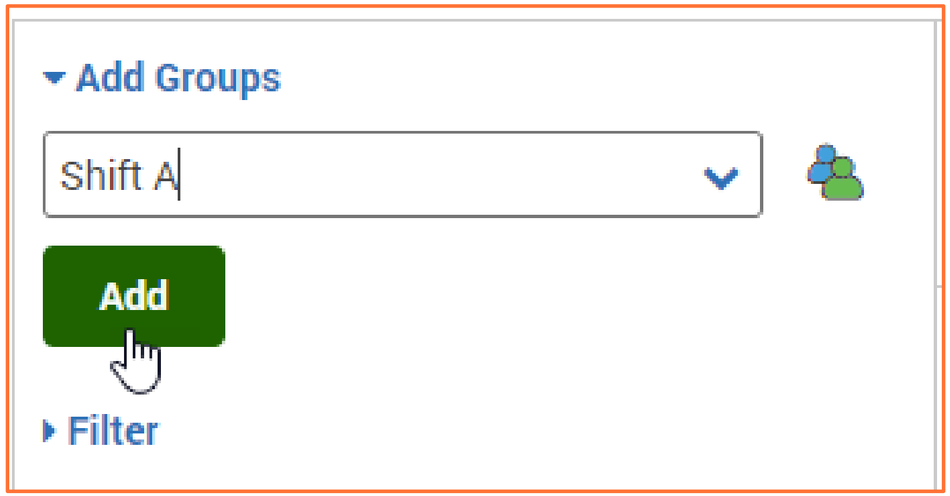


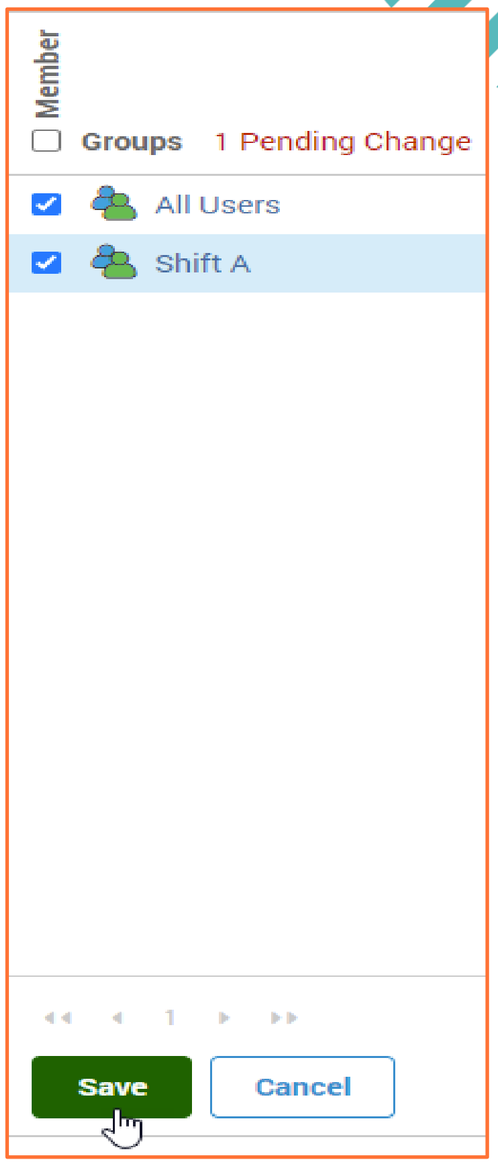
User Membership

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.

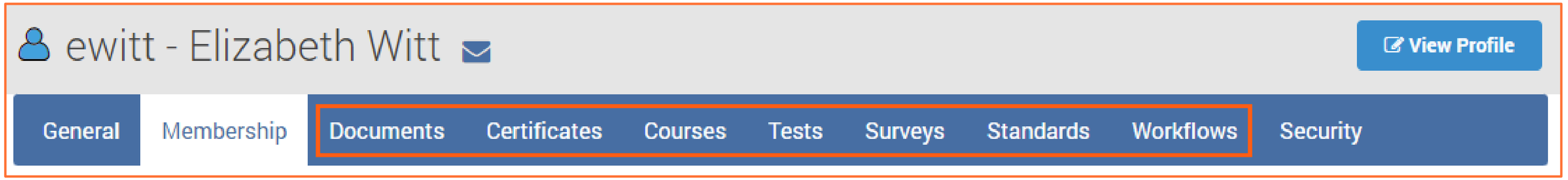
Once added, groups will populate on the right-hand view to confirm membership to be established, select Save.





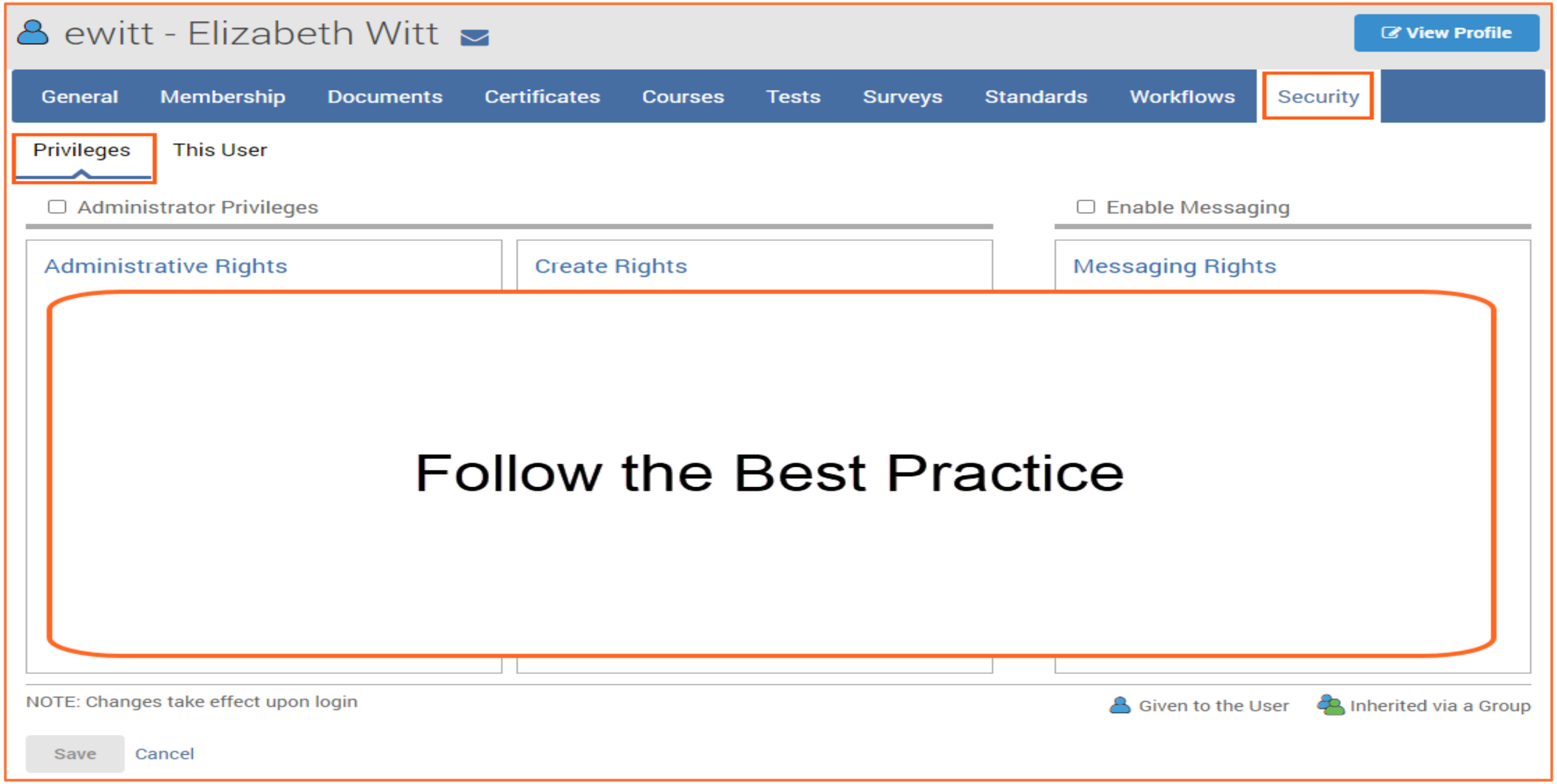
Note:
Users can belong to multiple groups. Access to content is defined within the group permissions and layered for user access.

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

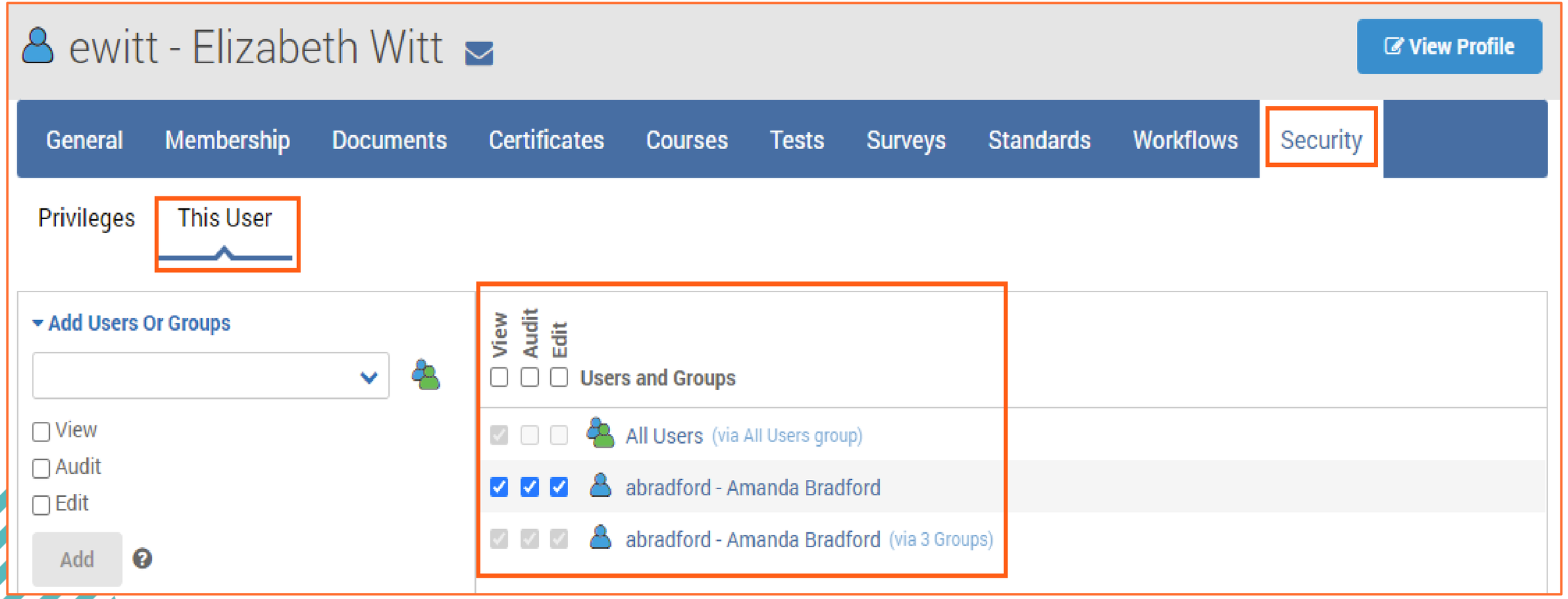


What's the Best Practice?

- ✓ 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

Identifies who knows this user exists (view) and the level of permissions they have over the user (audit and edit).

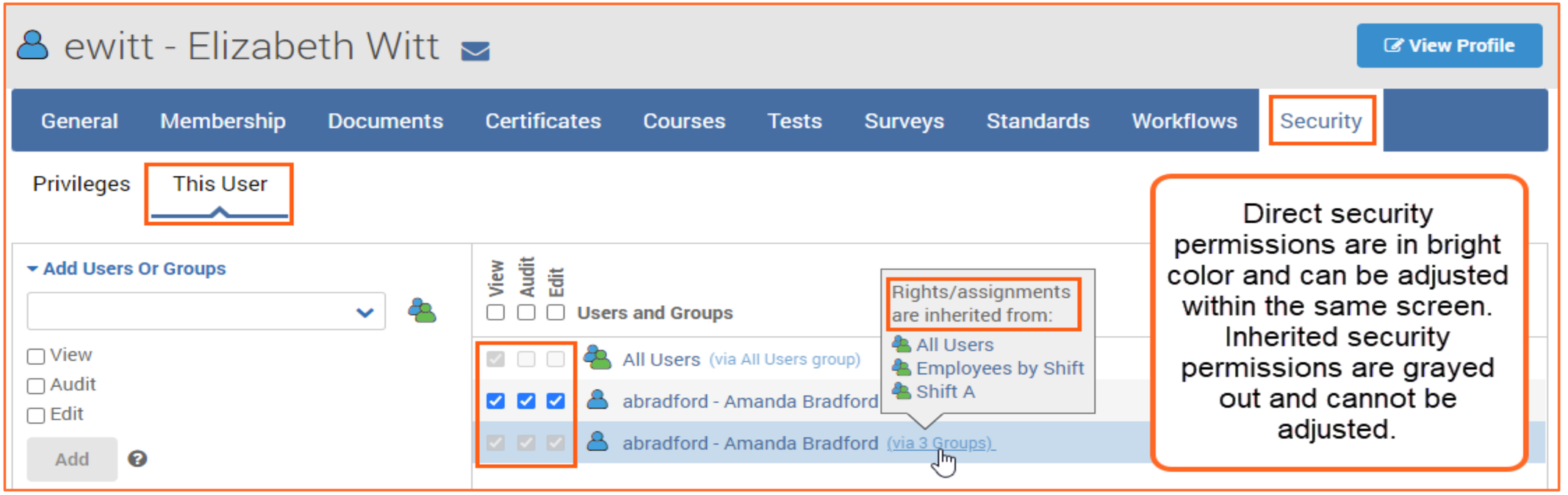


User Security: This User

✓ 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.



Todays 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

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