

A Step-by-Step Document Transition Guide

Moving your PM AM Policy Manual to PowerDMS

This guide provides step-by-step instructions for housing and maintaining policy manuals in PowerDMS and is intended for agencies transitioning from the PM AM platform.

In PM AM

1. Log into PM AM using your PM AM log in credentials.
2. Navigate to the toolbar on the left side of the screen.
3. Click the Audit Submission icon
4. Select Audit Submission
5. Under Audit Name, select the link for your assessment
6. Select the download icon on the right side of the assessment
7. Select none of the options that appear
8. Click Next. The policies will download to a zip file.

On Your Computer

1. Open the Zip File and extract all documents if necessary
2. Navigate to the policies. They will be organized by Chapter.

In PowerDMS

1. Determine if you want to upload your policy manual or if you want PowerDMS to upload your policy manual. PowerDMS will upload your documents, complete with folder creation, folder security, and assignments based on your business rules. For pricing, please review the article, [PowerDMS Professional Services](#), or email training@powerdms.com
2. Determine which Scenario applies to you:

Scenario #1: If you have a copy of your policies already in a folder structure inside PowerDMS and linked to your assessment, uploading your PM AM downloaded policies to the existing document will eliminate the need to re-attach these policies to your assessment.

- a. Navigate to the PowerDMS folder(s) where your Policy Manual is housed
- b. Click on the triple dot menu next to the name of one of the existing policies.
- c. Select “manage”

- d. Navigate to the Revisions tab
- e. Click “draft” directly under the blue tabs at the top of the page. Do **NOT** click “create a draft from this revision” button.
- f. Upload the corresponding policy you downloaded from PM AM by either dragging and dropping the document into the large box with the green and white plus button or by clicking the green and white plus button and searching the files on your computer.
- g. Use the document’s triple dot menu, located to the right of the “manage document” button in the upper right corner of the screen
- h. Select Publish this document
- i. Repeat steps *b – h* for each policy you need to replace with the downloaded PM AM policies.
- j. Navigate to your assessment. Notice that your WD attachments have a small red flag next to it. You can “clear” those flags by following the steps in the article, [Maintaining Assessment Attachments](#)

Scenario #2: If you already have policies in a folder structure inside PowerDMS but have not linked them into an assessment, you will need to follow steps *a – i* for Scenario #1. Once you have finished uploading all of your policies. You will need to attach applicable policies to your assessment. Follow the instructions in this four-minute video, [Adding Attachments to Standards Points](#).

Scenario #3: If you have not yet added your policies to PowerDMS, you can organize your policy manual using folders and subfolders to duplicate the structure from PM AM.

- a. To create a main folder
 1. Navigate to the Blue Menu on the left side of the screen
 2. Click on the filing cabinet
 3. Locate the word “Documents”
 4. Use the triple dot menu to the right of the word “Documents” and select “New Folder”
 5. Name the folder and click “Create”
- b. To create subfolders
 1. Select your main folders and move your cursor to the right until you see the triple dot menu for that folder
 2. Select “New Folder”



3. Name the folder and click “Create”
 4. Repeat steps 1 – 3 until you have the desired number of subfolders for your main folder.
- c. Once the folders* are all created, navigate to the appropriate folder and use that folder’s triple dot menu (located to the right of the folder).
1. Select New Document
 2. Drag and drop the downloaded PM AM policy into the large box with the green and white plus sign or click the green and white plus sign and select the file from your computer.
 3. Ensure the name of the policy in the right-side info panel is the desired name, change the name if necessary
 4. Use the document’s triple dot menu, located to the right of the “manage document” button in the upper right corner of your screen
 5. Select “publish this document”
 6. Repeat steps 1 - 5 until all your downloaded PM AM policies are entered into PowerDMS.
- d. Follow the instructions in this four-minute video, [Adding Attachments to Standards Points](#), to attach your policies to your assessment.

If you need further assistance, please refer to the article, [Creating and Assigning Document Folders and Sub-Folders](#) and [Uploading Documents in PowerDMS](#), or contact PowerDMS support at support@powerdms.com or 888-959-5158

***Note:** *You will need to ensure the appropriate security is set for your Policy Manual. Refer to the article, [Managing Document Folder Security](#), for more information.*

