PowerDMS
by NEOGOV

Everything Documents

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&
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A Few Things to Note:

- This session is being recorded.
- The recording will be automatically Emailed to all registrants of this session, as soon as it becomes available.
- You can and should download a copy of this presentation from the Handouts section of the GoToWebinar sidebar.
- You can type in your questions any time within the questions field of GoToWebinar

After This Session, You Will Be Able To:

- Upload or Create Documents
- Identify Document Accountability Features
- Manage Document Revisions
- Leverage Advanced Document Management Features in PowerDMS

You should already…

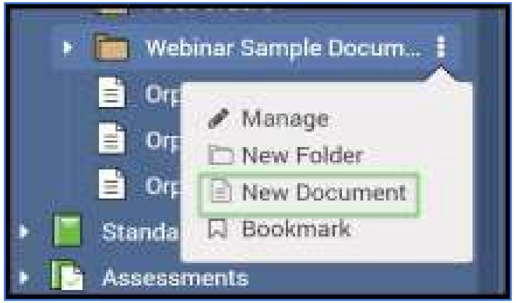
- ✓ Know how to create folders
- ✓ Be familiar with PowerDMS Security definitions
- ✓ Know how to set document and/or folder security
- ✓ Know what single sign on means and if your organization leverages it

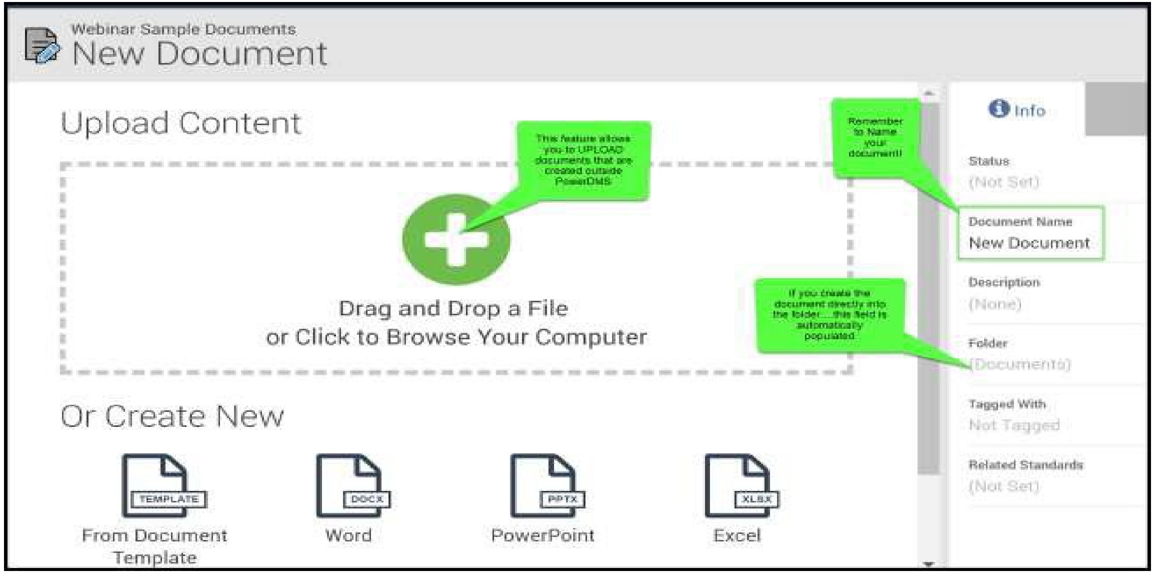
PowerDMS Tip

To store documents in PowerDMS, you can:

1. Upload the document
2. Create a document using Microsoft Office products
3. Embed a Video using the HTML feature
4. Create a new document from an existing PowerDMS document

UPLOADING DOCUMENTS


Webinar Sample Docum...
Or
Or
Or
Standa
Assessments
Manage
New Folder
New Document
Bookmark


Webinar Sample Documents

New Document

Upload Content

This feature allows you to UPLOAD documents that are created outside PowerDMS

Drag and Drop a File
or Click to Browse Your Computer

Remember to Name your document!!

If you create the document directly into the folder.....this field is automatically populated

Or Create New

Info

Status
(Not Set)

Document Name
New Document

Description
(None)

Folder
(Documents)

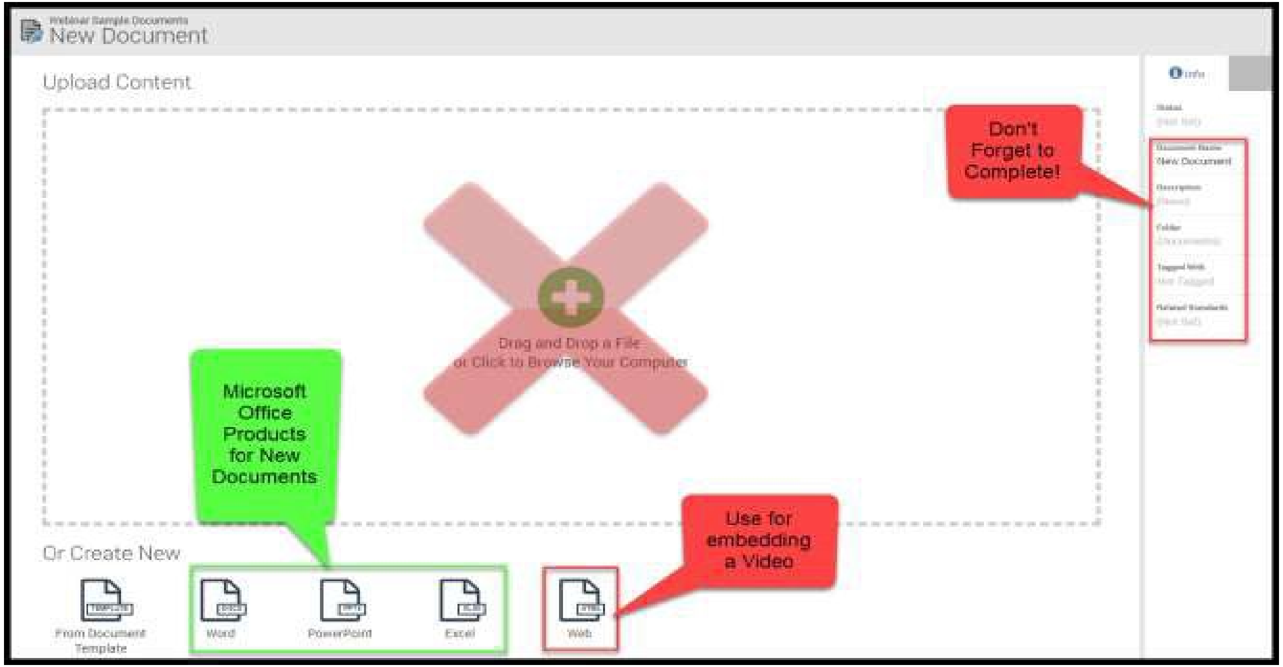
Tagged With
Not Tagged

Related Standards
(Not Set)

TEMPLATE
From Document Template
DOCX
Word
PPTX
PowerPoint
XLSX
Excel

Check out these PowerDMS articles on Naming Documents and Document Naming Guidelines

CREATING NEW DOCUMENTS


Webinar Sample Documents
New Document
Upload Content
Drag and Drop a File
or Click to Browse Your Computer
Or Create New
From Document Template
Word
PowerPoint
Excel
Web
Info

Status

Document Name
New Document

Description

Folder

Tagged With
Not Tagged

Related Standards

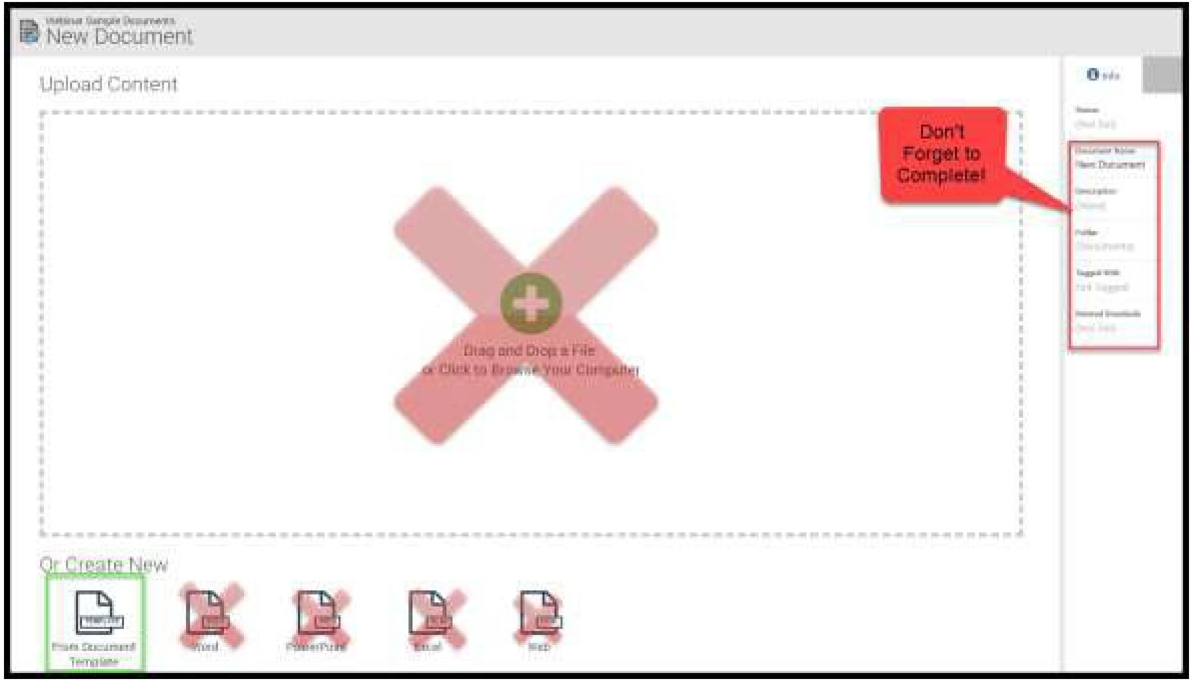
Don't Forget to Complete!

Microsoft Office Products for New Documents

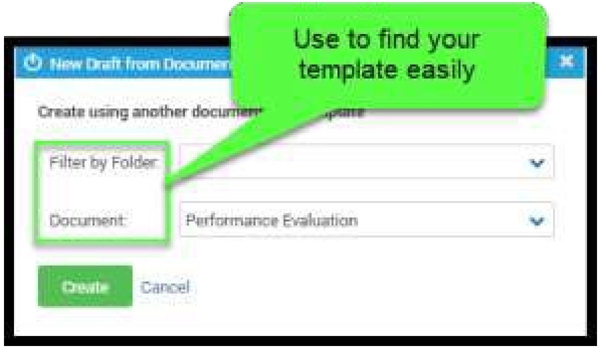
Use for embedding a Video

Check out this article on embedding a Video as a document.

CREATING A NEW DOCUMENT FROM TEMPLATE


New Document
Upload Content
Drag and Drop a File
or Click to Browse Your Computer
Or Create New
From Document Template
Word
PowerPoint
Excel
Web

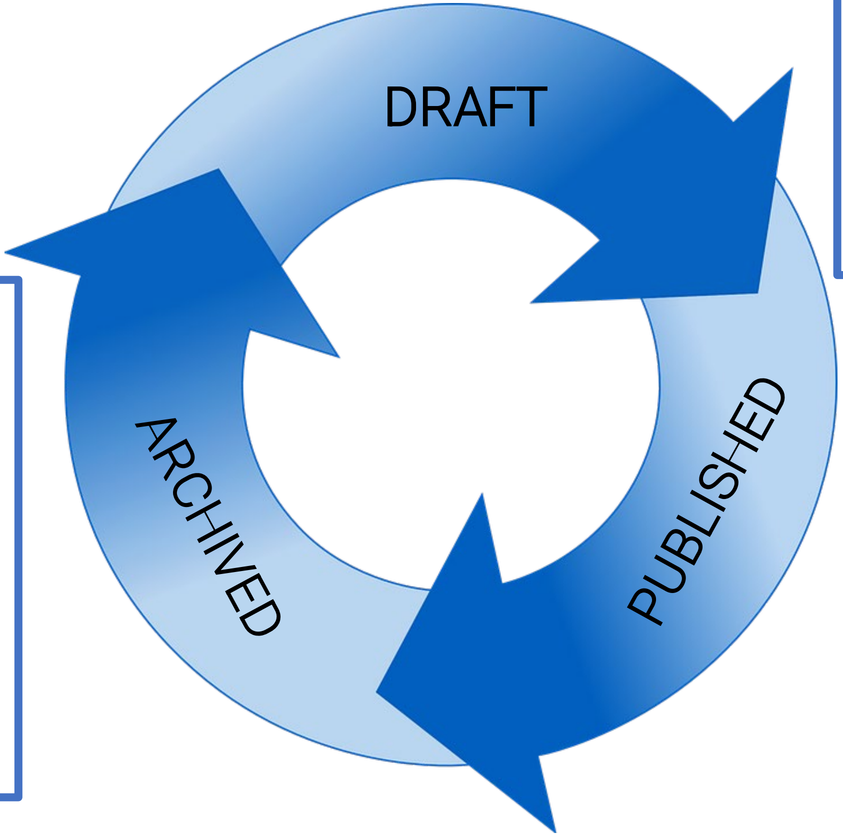
Don't Forget to Complete!


New Draft from Documen
Create using another document
Filter by Folder
Create
Cancel

Document: Performance Evaluation

Use to find your template easily

DOCUMENT LIFECYCLE



All documents begin in a draft state once loaded into PowerDMS.

Drafts are visible only to administrators with security permissions to the document.

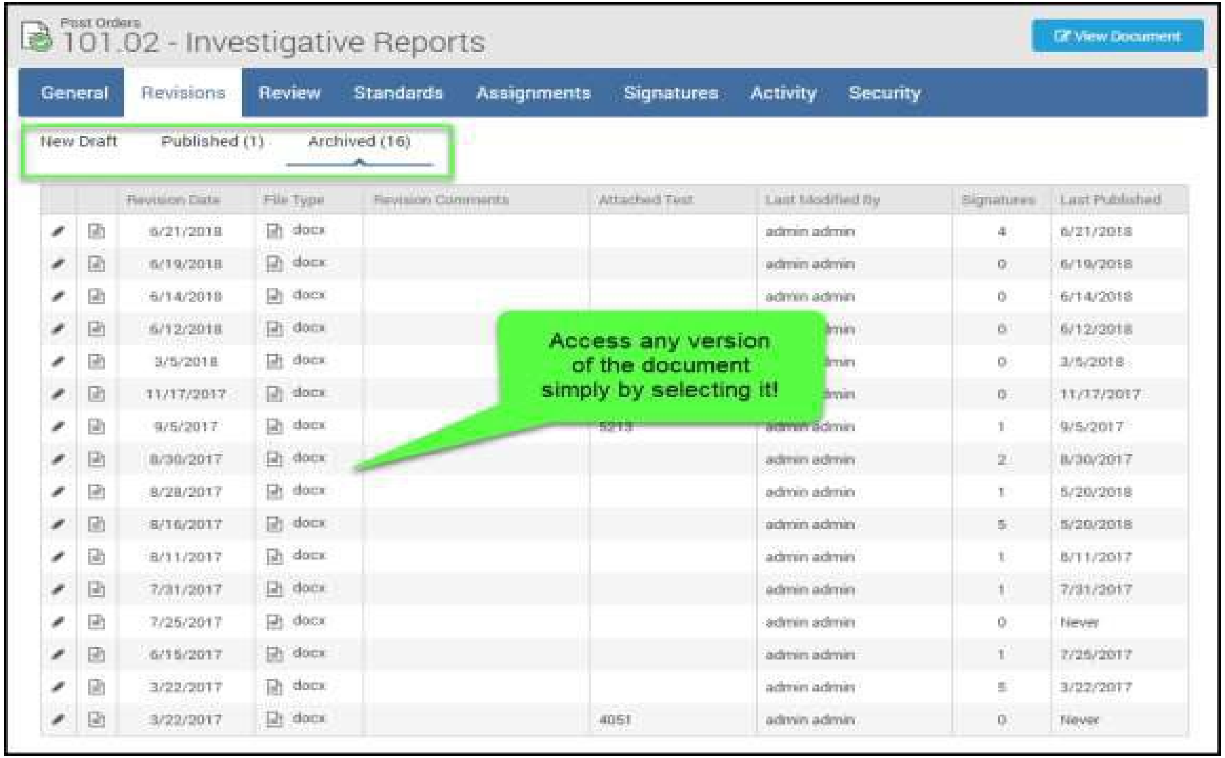
Published document versions imply the context of the document are ready for consumption/viewing.

Users must have view rights to the document to see the document.

Archived document versions imply the context of the document outdated and should no longer be visible to end users.

Administrators with at least audit permissions can still locate and view archived versions.

DOCUMENT LIFECYCLE



Post Orders

101.02 - Investigative Reports

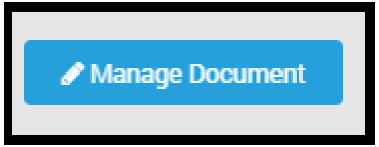
View Document
General
Revisions
Review
Standards
Assignments
Signatures
Activity
Security
New Draft
Published (1)
Archived (16)

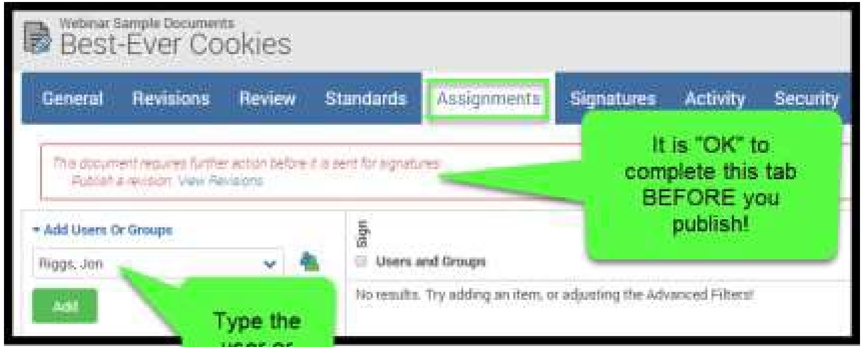
		Revision Date	File Type	Revision Comments	Attached Test	Last Modified By	Signatures	Last Published
✎	🗎	6/21/2018	docx			admin admin	4	6/21/2018
✎	🗎	6/19/2018	docx			admin admin	0	6/19/2018
✎	🗎	6/14/2018	docx			admin admin	0	6/14/2018
✎	🗎	6/12/2018	docx			min	0	6/12/2018
✎	🗎	3/5/2018	docx			min	0	3/5/2018
✎	🗎	11/17/2017	docx			min	0	11/17/2017
✎	🗎	9/5/2017	docx		5213	admin admin	1	9/5/2017
✎	🗎	8/30/2017	docx			admin admin	2	8/30/2017
✎	🗎	8/28/2017	docx			admin admin	1	5/20/2018
✎	🗎	8/16/2017	docx			admin admin	5	5/20/2018
✎	🗎	8/11/2017	docx			admin admin	1	8/11/2017
✎	🗎	7/31/2017	docx			admin admin	1	7/31/2017
✎	🗎	7/25/2017	docx			admin admin	0	Never
✎	🗎	6/15/2017	docx			admin admin	1	7/25/2017
✎	🗎	3/22/2017	docx			admin admin	5	3/22/2017
✎	🗎	3/22/2017	docx		4051	admin admin	0	Never

Access any version of the document simply by selecting it!

ACCOUNTABILITY FEATURES

Assignments at Document Level


Manage Document


Webinar Sample Documents
Best-Ever Cookies
General
Revisions
Review
Standards
Assignments
Signatures
Activity
Security
Add Users Or Groups
Riggs, Jon
Add
Sign
Users and Groups

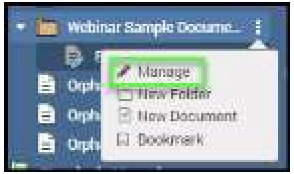
This document requires further action before it is sent for signatures.
Publish a revision View Revisions

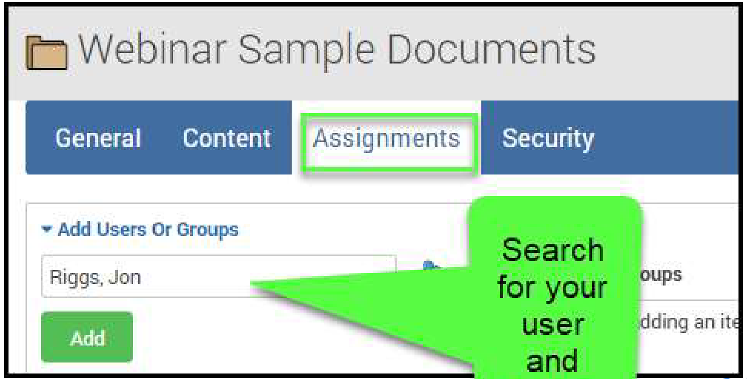
No results. Try adding an item, or adjusting the Advanced Filters!

It is "OK" to complete this tab BEFORE you publish!

Type the user or group then "ADD"

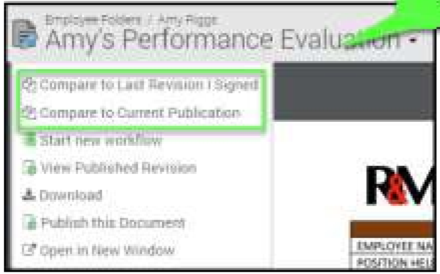
Assignments at Folder Level


Webinar Sample Docume...
Orph
Orph
Orph
Manage
New Folder
New Document
Bookmark

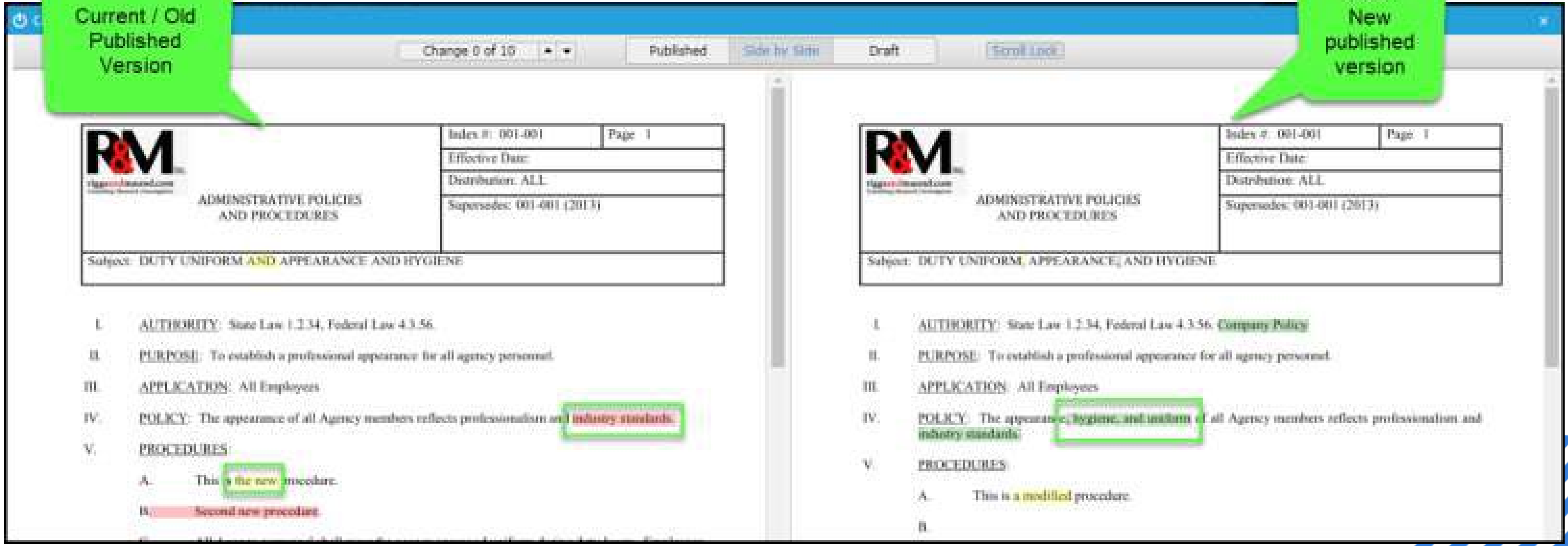

Webinar Sample Documents
General
Content
Assignments
Security
Add Users Or Groups
Riggs, Jon
Add
oups
dding an ite

Search for your user and "ADD"

DOCUMENT SIGNATURES


Employee Folders / Amy Riggs
Amy's Performance Evaluation
Compare to Last Revision I Signed
Compare to Current Publication
Start new workflow
View Published Revision
Download
Publish this Document
Open in New Window
R&M
EMPLOYEE NA
POSITION HEL

Use the dropdown menu to access the compare feature


Change 0 of 10
Published
Side by Side
Draft
Scroll Lock

Current / Old Published Version

R&M

ADMINISTRATIVE POLICIES AND PROCEDURES

Index #: 001-001	Page 1
Effective Date:	
Distribution: ALL	
Supersedes: 001-001 (2013)	

Subject: DUTY UNIFORM AND APPEARANCE AND HYGIENE

I. AUTHORITY: State Law 1.2.34, Federal Law 4.3.56.

II. PURPOSE: To establish a professional appearance for all agency personnel.

III. APPLICATION: All Employees

IV. POLICY: The appearance of all Agency members reflects professionalism and industry standards.

V. PROCEDURES:

A. This is the new procedure.

B. Second new procedure

Draft / New published version

R&M

ADMINISTRATIVE POLICIES AND PROCEDURES

Index #: 001-001	Page 1
Effective Date:	
Distribution: ALL	
Supersedes: 001-001 (2013)	

Subject: DUTY UNIFORM, APPEARANCE, AND HYGIENE

I. AUTHORITY: State Law 1.2.34, Federal Law 4.3.56. Company Policy

II. PURPOSE: To establish a professional appearance for all agency personnel.

III. APPLICATION: All Employees

IV. POLICY: The appearance, hygiene, and uniform of all Agency members reflects professionalism and industry standards.

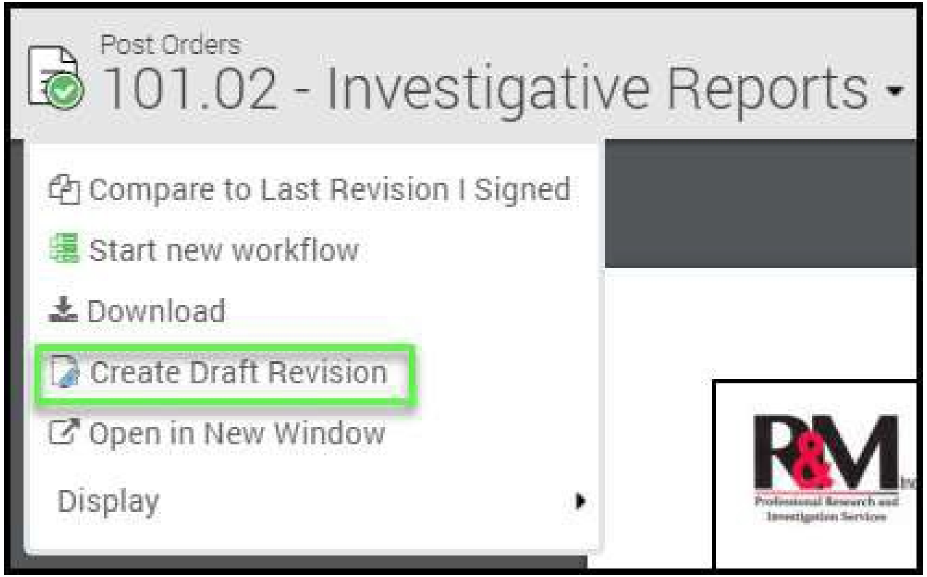
V. PROCEDURES:

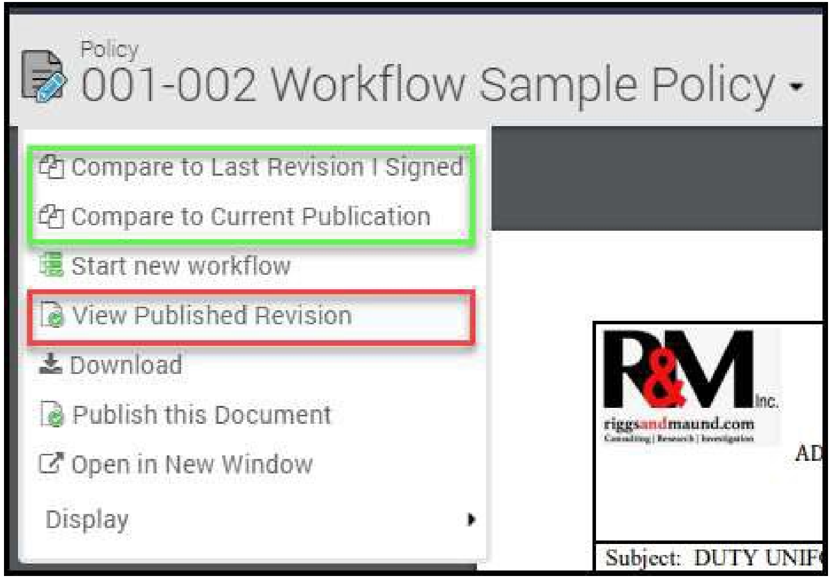
A. This is a modified procedure.

B.

Check out this article on [Comparing](#) documents.

DOCUMENT REVISION


Post Orders
101.02 - Investigative Reports
Compare to Last Revision I Signed
Start new workflow
Download
Create Draft Revision
Open in New Window
Display
R&M Inc
Professional Research and Investigation Services


Policy
001-002 Workflow Sample Policy
Compare to Last Revision I Signed
Compare to Current Publication
Start new workflow
View Published Revision
Download
Publish this Document
Open in New Window
Display
R&M Inc.
riggsandmaund.com
Consulting | Research | Investigation
AD
Subject: DUTY UNIF

You will need to have already installed PowerDMS Author to revise your document.

PowerDMS Tip

Use the compare feature to quickly and easily see the changes or modifications to document. The changes are highlighted using color coding.

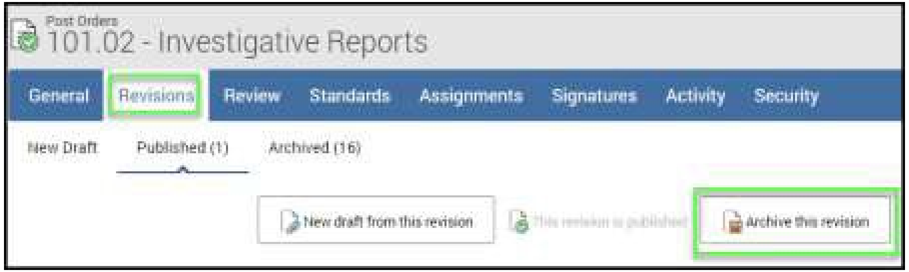
Red Highlights = Deletions from the old document (Left)

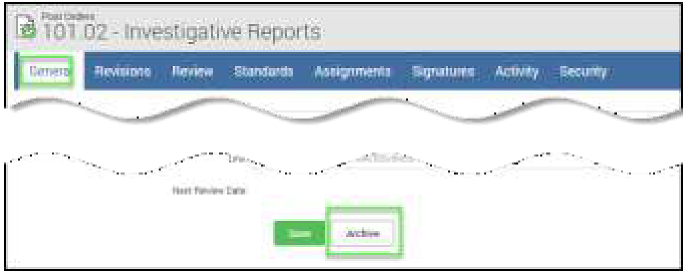
Green Highlights = Additions to the new document (Right)

Yellow Highlights = Modifications between the two documents (Both)

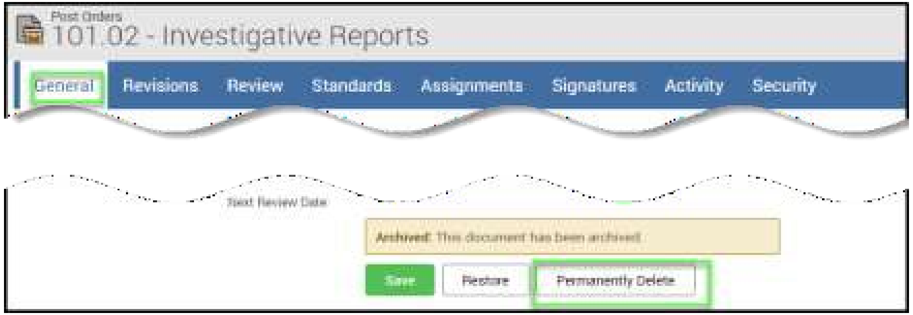
ARCHIVING OR DELETING DOCUMENTS

Archive


Post Orders
101.02 - Investigative Reports
General
Revisions
Review
Standards
Assignments
Signatures
Activity
Security
New Draft
Published (1)
Archived (16)
New draft from this revision
This revision is published
Archive this revision

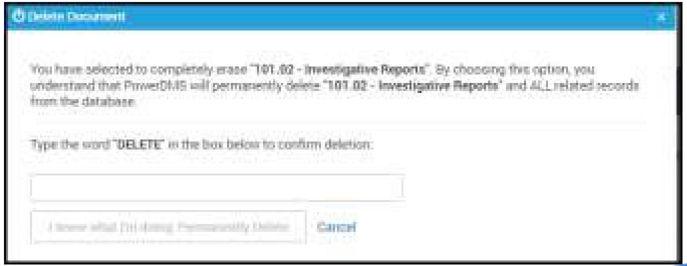

Post Orders
101.02 - Investigative Reports
General
Revisions
Review
Standards
Assignments
Signatures
Activity
Security
Next Review Date
Save
Archive

Delete


Post Orders
101.02 - Investigative Reports
General
Revisions
Review
Standards
Assignments
Signatures
Activity
Security
Next Review Date

Archived: This document has been archived.

Save
Restore
Permanently Delete


Delete Document
×

You have selected to completely erase "**101.02 - Investigative Reports**". By choosing this option, you understand that PowerDMS will permanently delete "**101.02 - Investigative Reports**" and ALL related records from the database.

Type the word "**DELETE**" in the box below to confirm deletion:

Cancel

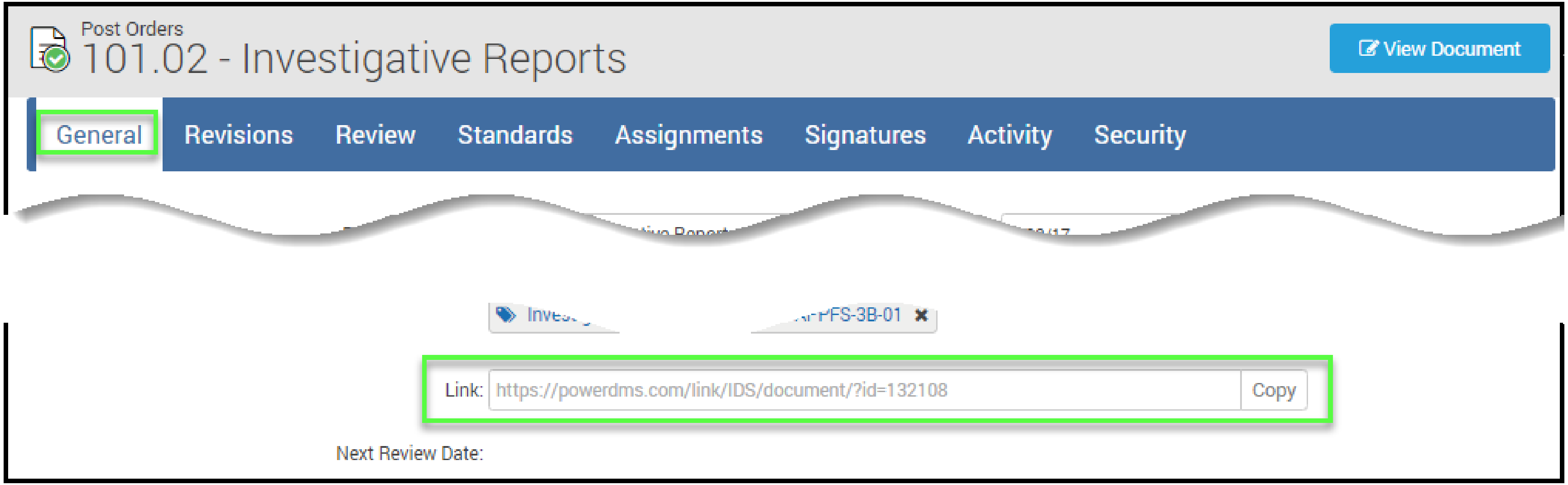
PowerDMS Tip

It is a Policy Best Practice to archive your documents instead of deleting them.

Not only are deletions permanent actions and deletes the content, but it also deletes all historical data associated with the document.

- × Version History
- × Signature Acknowledgements

HYPERLINKING DOCUMENTS


Post Orders

101.02 - Investigative Reports

Link: https://powerdms.com/link/IDS/document/?id=132108

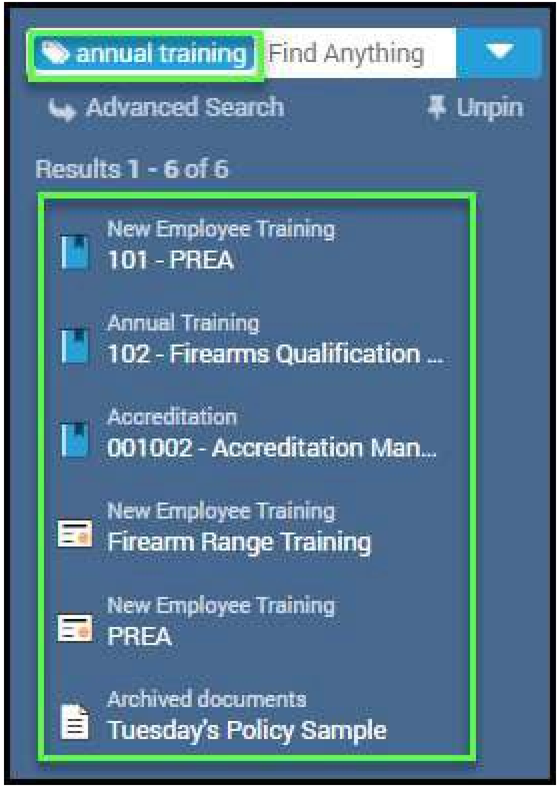
Next Review Date:

View Document
General
Revisions
Review
Standards
Assignments
Signatures
Activity
Security
Copy

- ✓ ONLY use the hyperlink provided in the General tab of the document.
- × DO NOT use the browser hyperlink!

TAGS

Categorize


annual training
Find Anything
Advanced Search
Unpin

Results 1 - 6 of 6

New Employee Training
101 - PREA

Annual Training
102 - Firearms Qualification ...

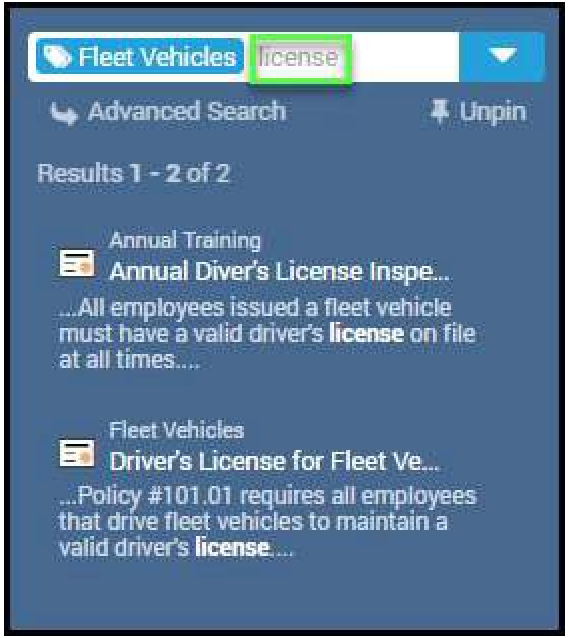
Accreditation
001002 - Accreditation Man...

New Employee Training
Firearm Range Training

New Employee Training
PREA

Archived documents
Tuesday's Policy Sample

Search

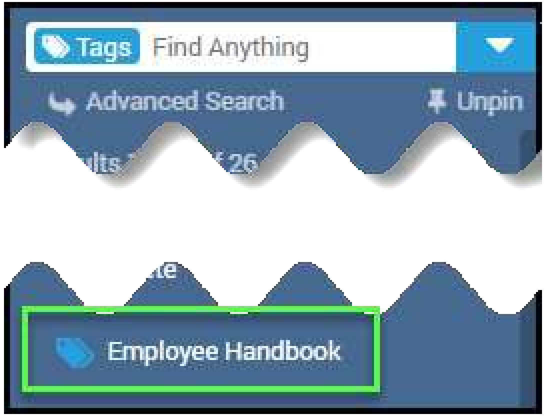

Fleet Vehicles
license
Advanced Search
Unpin

Results 1 - 2 of 2

Annual Training
Annual Diver's License Inspe...
...All employees issued a fleet vehicle must have a valid driver's **license** on file at all times....

Fleet Vehicles
Driver's License for Fleet Ve...
...Policy #101.01 requires all employees that drive fleet vehicles to maintain a valid driver's **license**....

Bind


Tags
Find Anything
Advanced Search
Unpin
Employee Handbook

You Should Now Be Able To:

- ✓ Upload and Create Documents
- ✓ Identify Document Accountability Features
- ✓ Manage Document Revisions
- ✓ Leverage Advanced Document Management Features in PowerDMS

Questions?