

PowerDMS[®]

by NEOGOV

Attaching a Test to a Policy in PowerDMS

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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:

- Create a test
- Avoid common administrative pitfalls
- Attach a test to a Policy/Document
- Visualize the experience for your users



You should already...

- ✓ Be familiar with standard security definitions.
- ✓ Understand the difference between assignment vs. security.
- ✓ How to create/upload your policies and properly manage them using Best Practices.



PowerDMS Tip

Remember you can use a test by:

1. Attach a test to a policy/document
2. Attach a test as an element in a course
3. Not associating it with any other content (standalone)

Process Flow

1. Ensure your intended document is loaded and ready in PowerDMS
 - Ideally in a draft state but can already be a published document
2. Create your needed test and ensure it is published
3. Attach your published test to your document
4. Confirm needed Assignments and security
5. If document in a draft state, publish your document

Support Resources

Technical Issues? Contact the Service Team: 1-888-959-5158 or support@powerdms.com

PowerDMS University Courses

Success Community Resources

Self-Paced:

- Uploading and Managing Documents
- Creating Tests

[Creating Tests](#)

[Attaching a Test to a Document](#)

Instructor-Led:

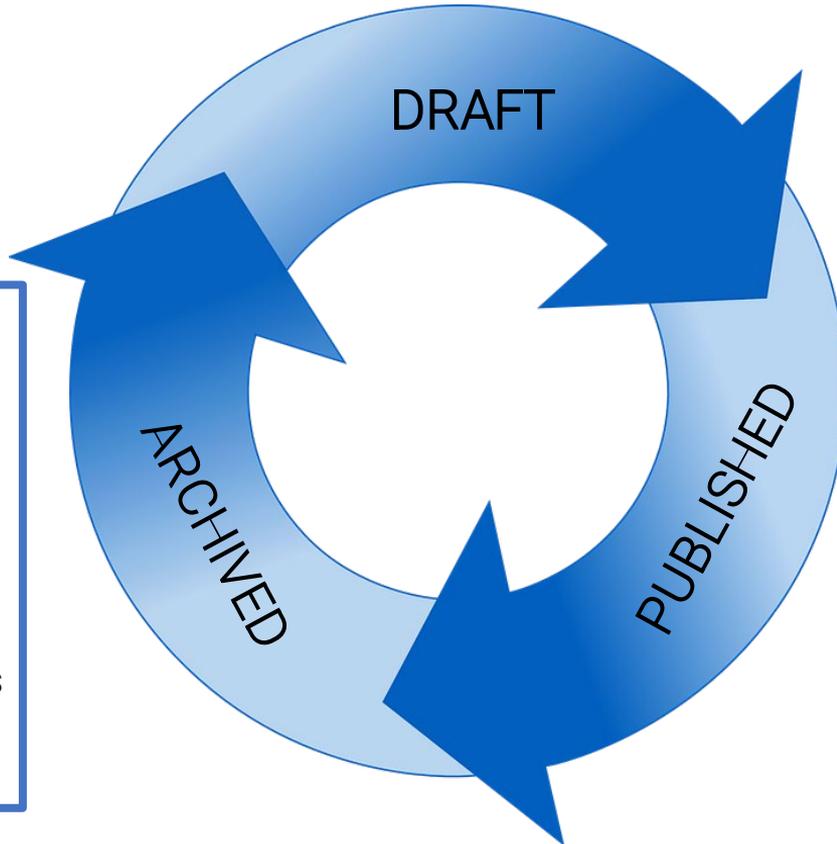
- University Live: Document Management
- University Live: Creating Tests & Surveys



PowerDMS Document Tips

- ✓ Follow the slides below for document support links!

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.

Archived document versions imply the context of the document outdated and should no longer be visible to end users.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

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.

DOCUMENT LIFECYCLE

Post Orders
101.02 - Investigative Reports View Document

General Revisions Review Standards Assignments Signatures Activity Security

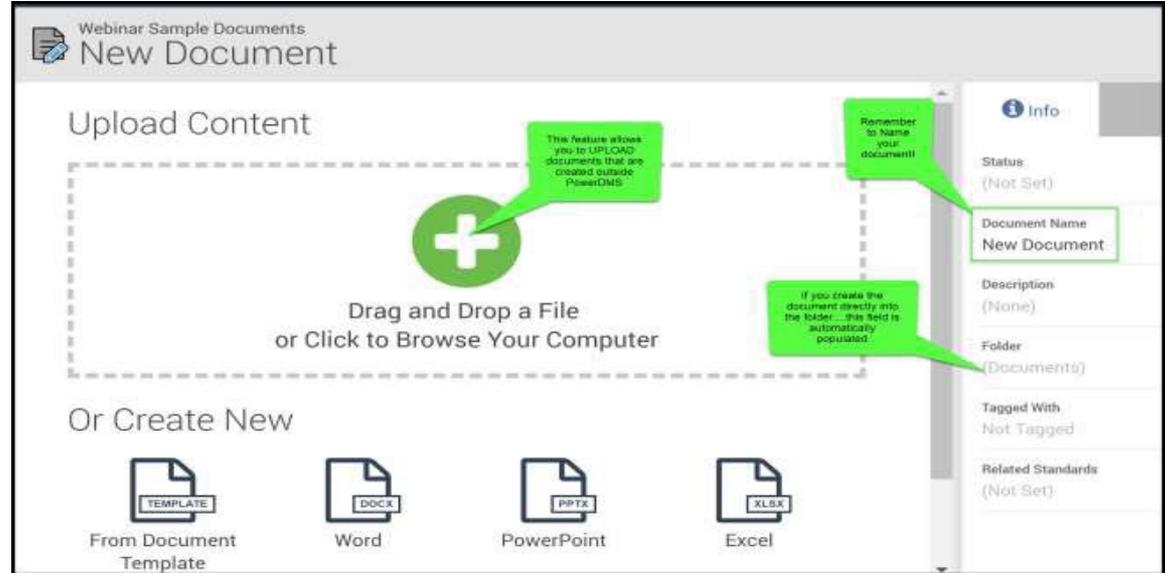
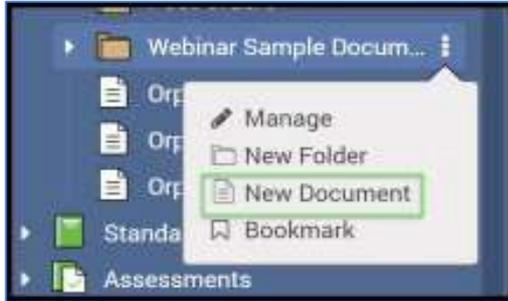
New Draft Published (1) **Archived (16)**

	Revision Date	File Type	Revision Comments	Attached Text	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			admin admin	0	6/12/2018
✎ 📄	3/5/2018	docx			admin admin	0	3/5/2018
✎ 📄	11/17/2017	docx			admin admin	0	11/17/2017
✎ 📄	9/5/2017	docx		5215	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
✎ 📄	6/19/2017	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!



UPLOADING DOCUMENTS



Check out these PowerDMS articles on [Naming Documents](#) and [Document Naming Guidelines](#)



CREATING NEW DOCUMENTS

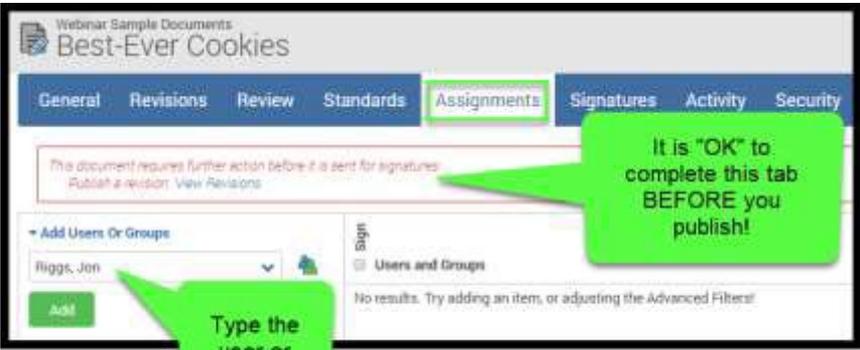
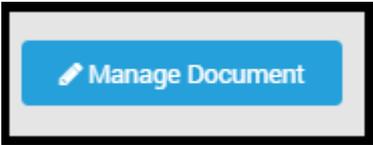
The screenshot shows the 'New Document' interface. At the top, it says 'New Document' and 'Upload Content'. A large dashed box contains a red 'X' with a green plus sign in the center, and the text 'Drag and Drop a File or Click to Browse Your Computer'. Below this, there are five options: 'From Document Template', 'Word', 'PowerPoint', 'Excel', and 'Web'. A green callout bubble points to the 'Word', 'PowerPoint', and 'Excel' options, containing the text 'Microsoft Office Products for New Documents'. A red callout bubble points to the 'Web' option, containing the text 'Use for embedding a Video'. Another red callout bubble points to the 'Info' sidebar on the right, containing the text 'Don't Forget to Complete!'. The 'Info' sidebar shows fields for 'Document Name', 'Description', 'Folder', 'Tagged With', and 'Related Documents', each with a 'New' button.

Check out this article on embedding a [Video](#) as a document.

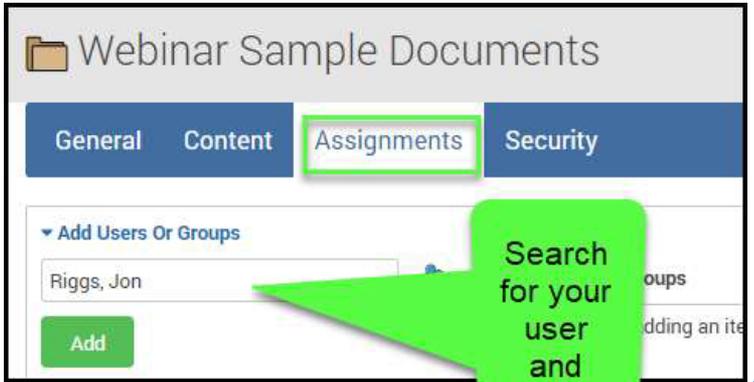
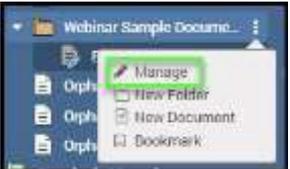


ACCOUNTABILITY FEATURES

Assignments at Document Level



Assignments at Folder Level



You Should Now Be Able To:

- Create a test
- Avoid common administrative pitfalls
- Attach a test to a Policy/Document
- Understand the experience for your users





Questions?