



Ins and Outs of Being a New Administrator

Facilitator: Brittany Van Etten
trainingteam@powerdms.com

Brittany Van Etten

Training Specialist I



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



Objectives:

- Manage existing groups.
- Review security and assignments.
- Create new users in a group.
- Utilize the Administrative Dashboard and Analytics.



Common Terms in PowerDMS

Privileges

What you can do in PowerDMS.
IE. Limited admin that can create training content

Security

What level of access the users have in PowerDMS.

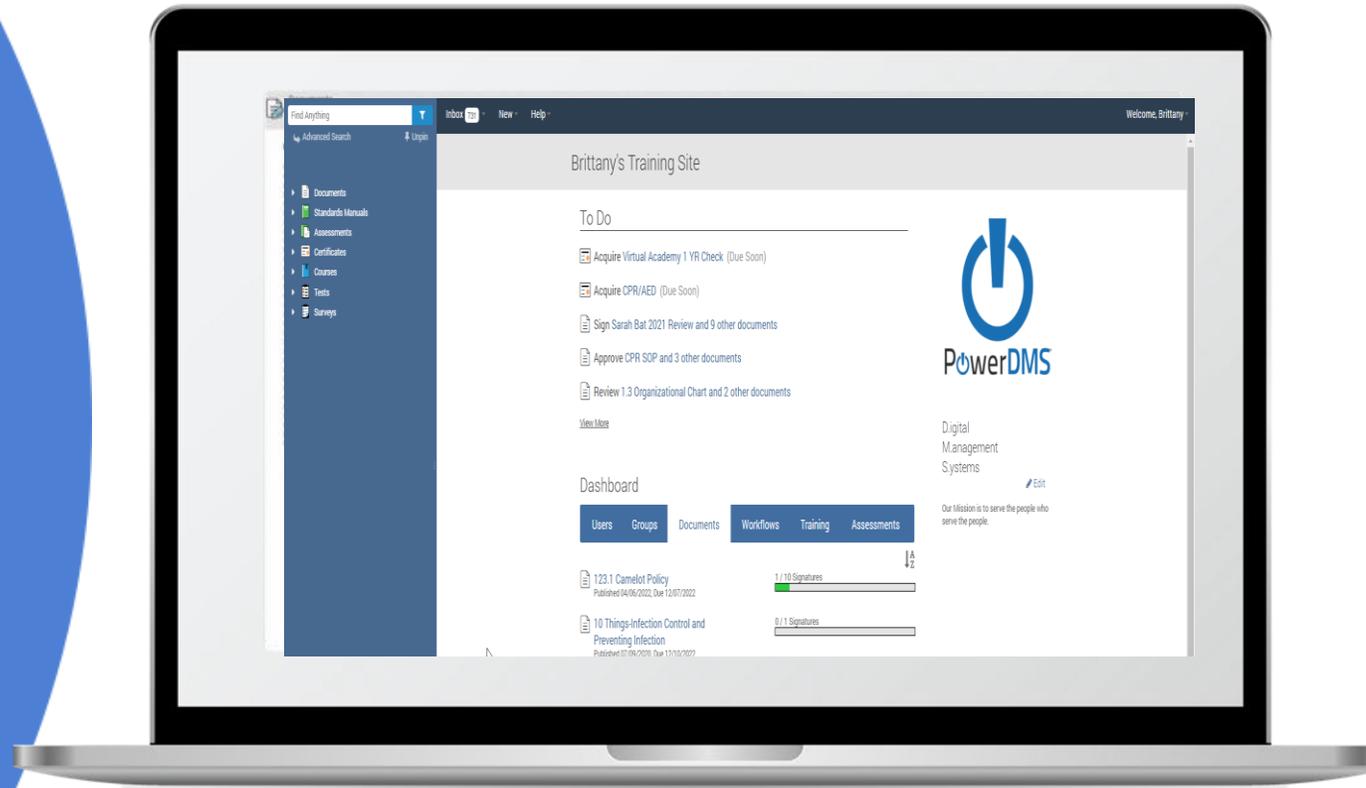
Types of Users

Master Admin, Limited Admin, and End User

PowerDMS

Navigating the Homepage

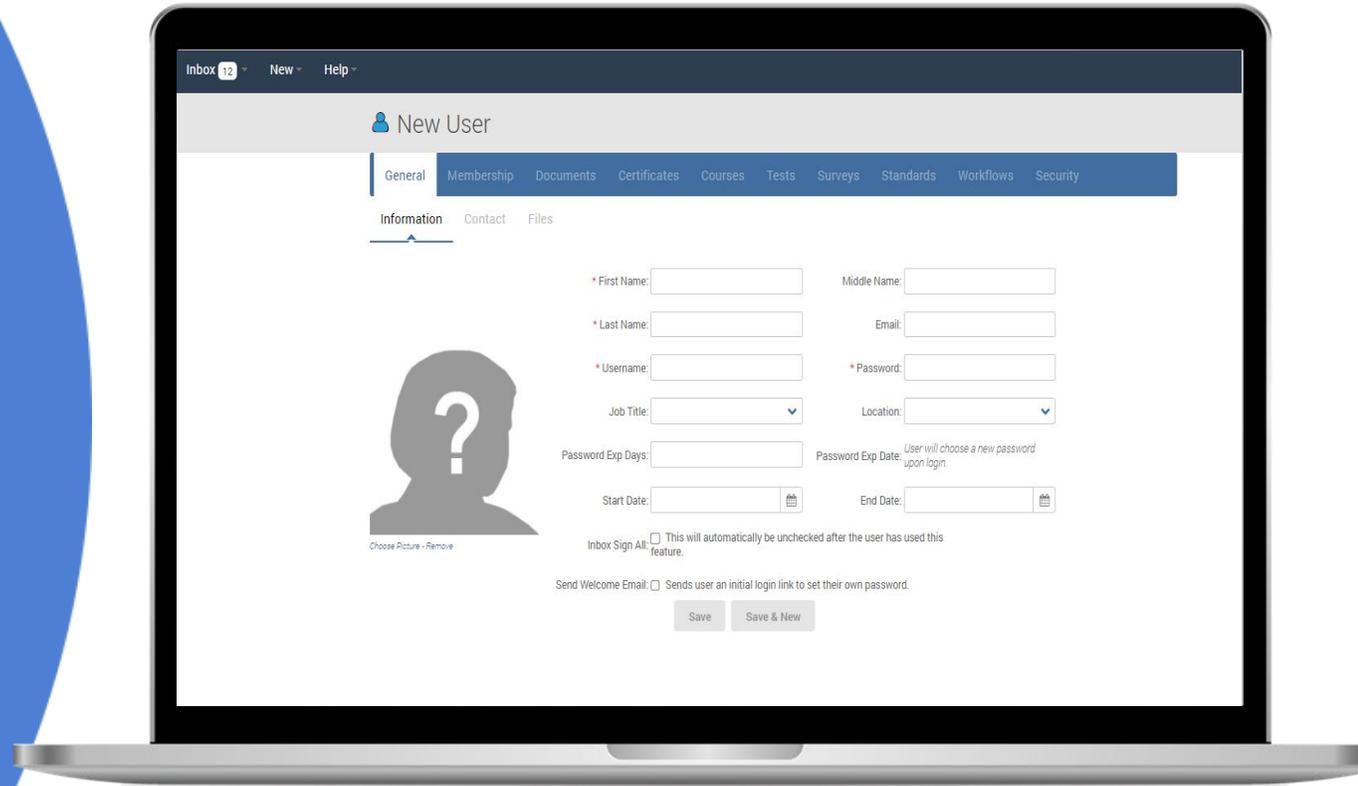
- Note: Depending on the type of user, the visibility may vary.
- Review [THIS](#) article for more information.



PowerDMS

Adding New Users

- To create a user, enter First Name, Last Name, Username and Password or Email to set a Password
- NOTE: Email is required to access PowerDMS University for Limited or Master Administrators



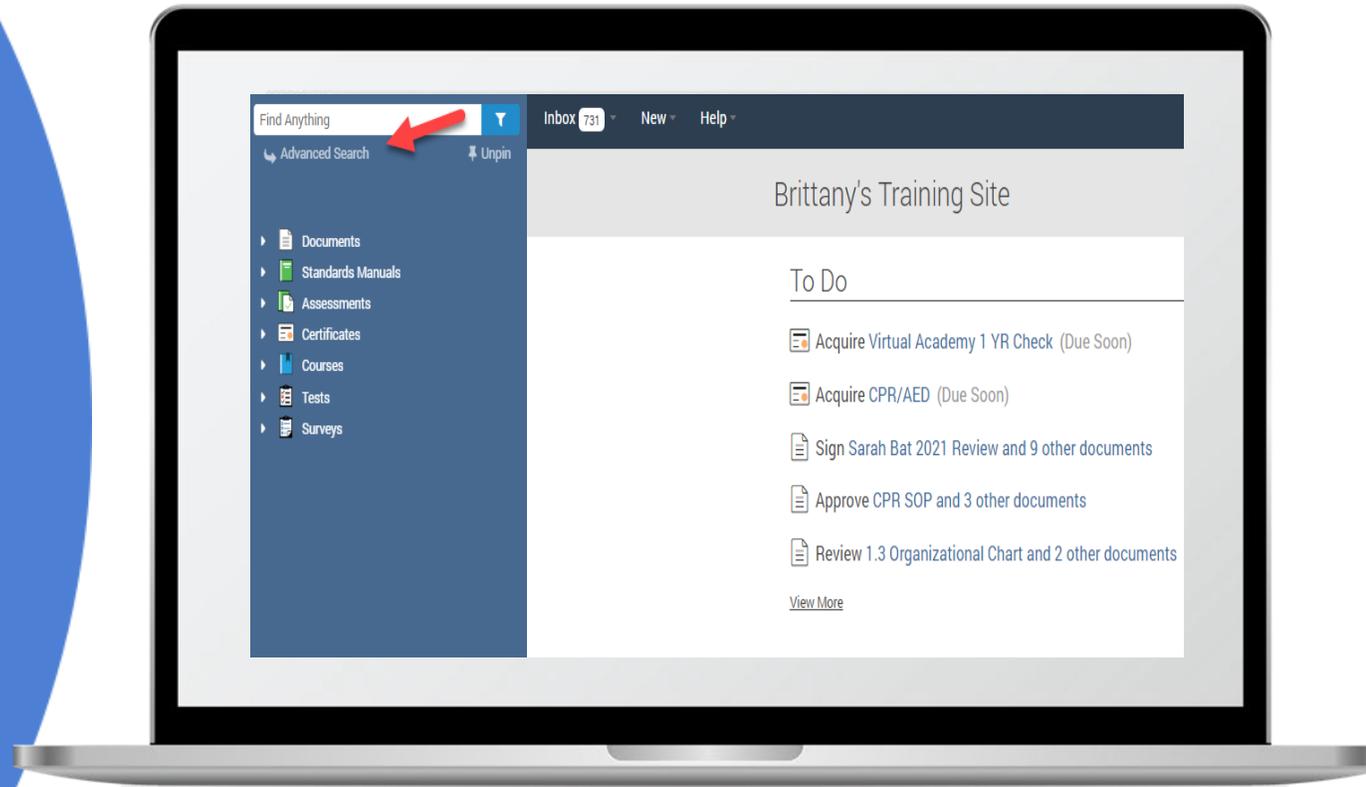
The screenshot shows the 'New User' form in the PowerDMS application. The form is displayed on a laptop screen and includes the following elements:

- Navigation:** 'Inbox 12', 'New', and 'Help' links at the top left.
- Page Title:** 'New User' with a user icon.
- Menu:** 'General', 'Membership', 'Documents', 'Certificates', 'Courses', 'Tests', 'Surveys', 'Standards', 'Workflows', and 'Security'.
- Sub-headers:** 'Information', 'Contact', and 'Files'.
- Form Fields:**
 - * First Name:
 - Middle Name:
 - * Last Name:
 - Email:
 - * Username:
 - * Password:
 - Job Title:
 - Location:
 - Password Exp Days:
 - Password Exp Date: (User will choose a new password upon login)
 - Start Date:
 - End Date:
- Image Placeholder:** A silhouette of a person with a question mark, labeled 'Choose Picture - Remove'.
- Checkboxes:**
 - 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.
- Buttons:** 'Save' and 'Save & New'.

PowerDMS

Locating Archived Content

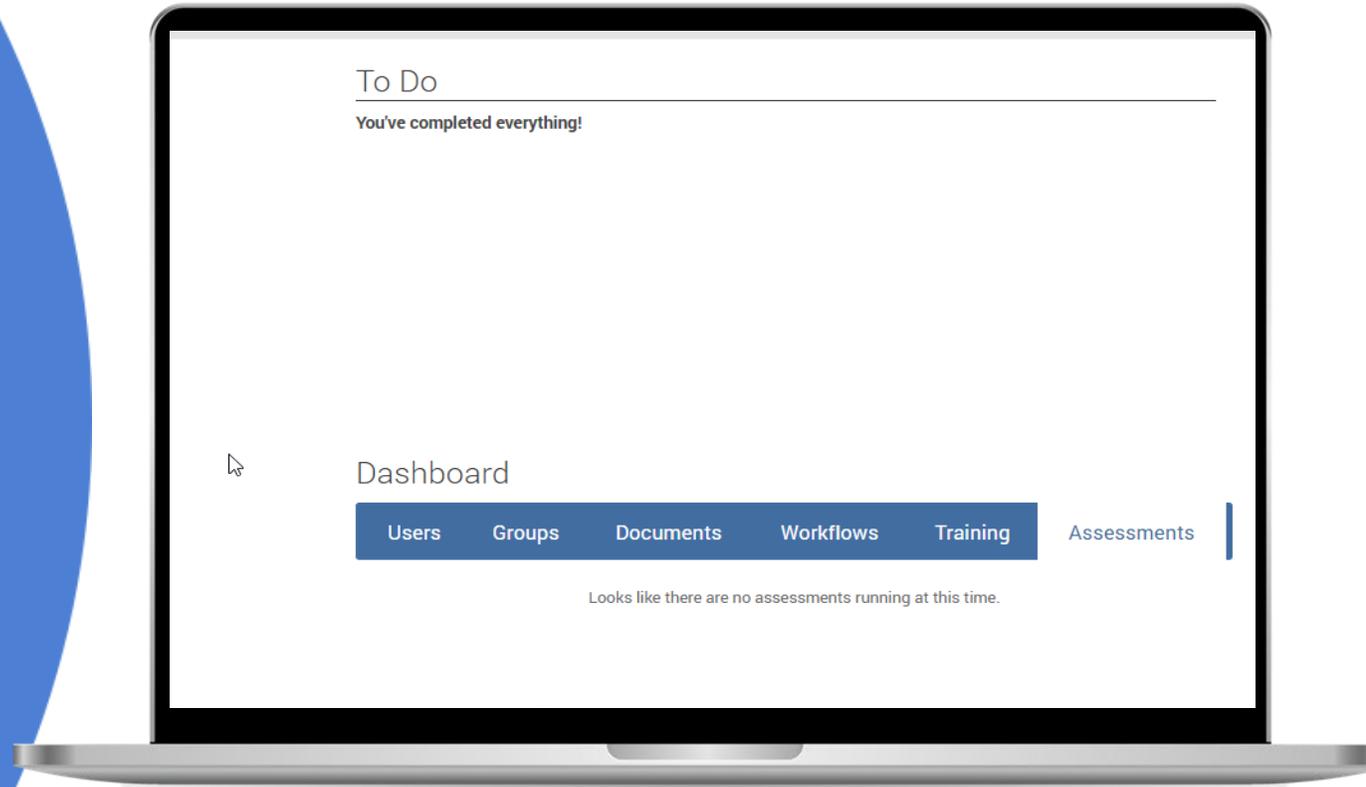
- From the homepage, click on Advanced Search.
- Apply additional filtering criteria based on what you are searching.



PowerDMS

Reviewing the Dashboard

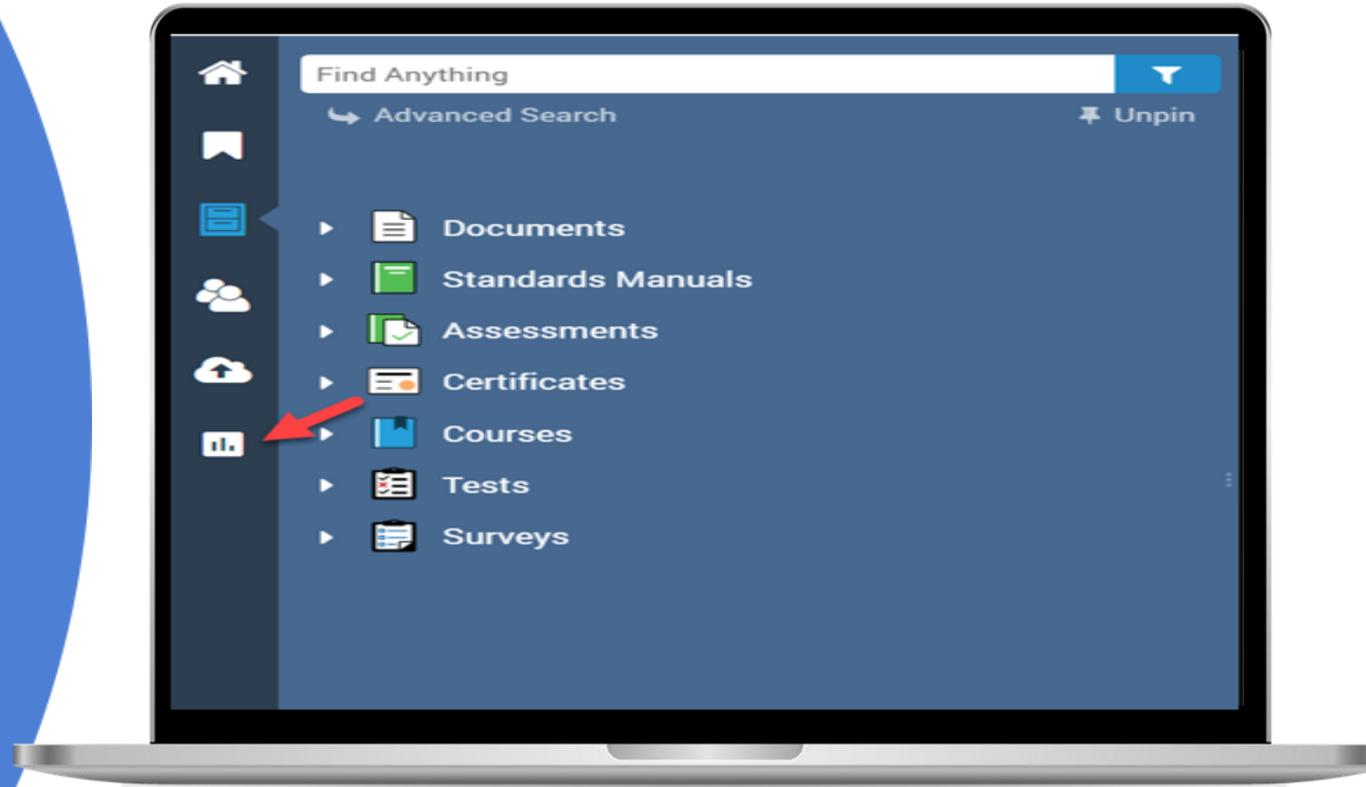
- From the homepage, review the Dashboard
- Use the tabs to further filter and view specific content



PowerDMS

Accessing Analytics

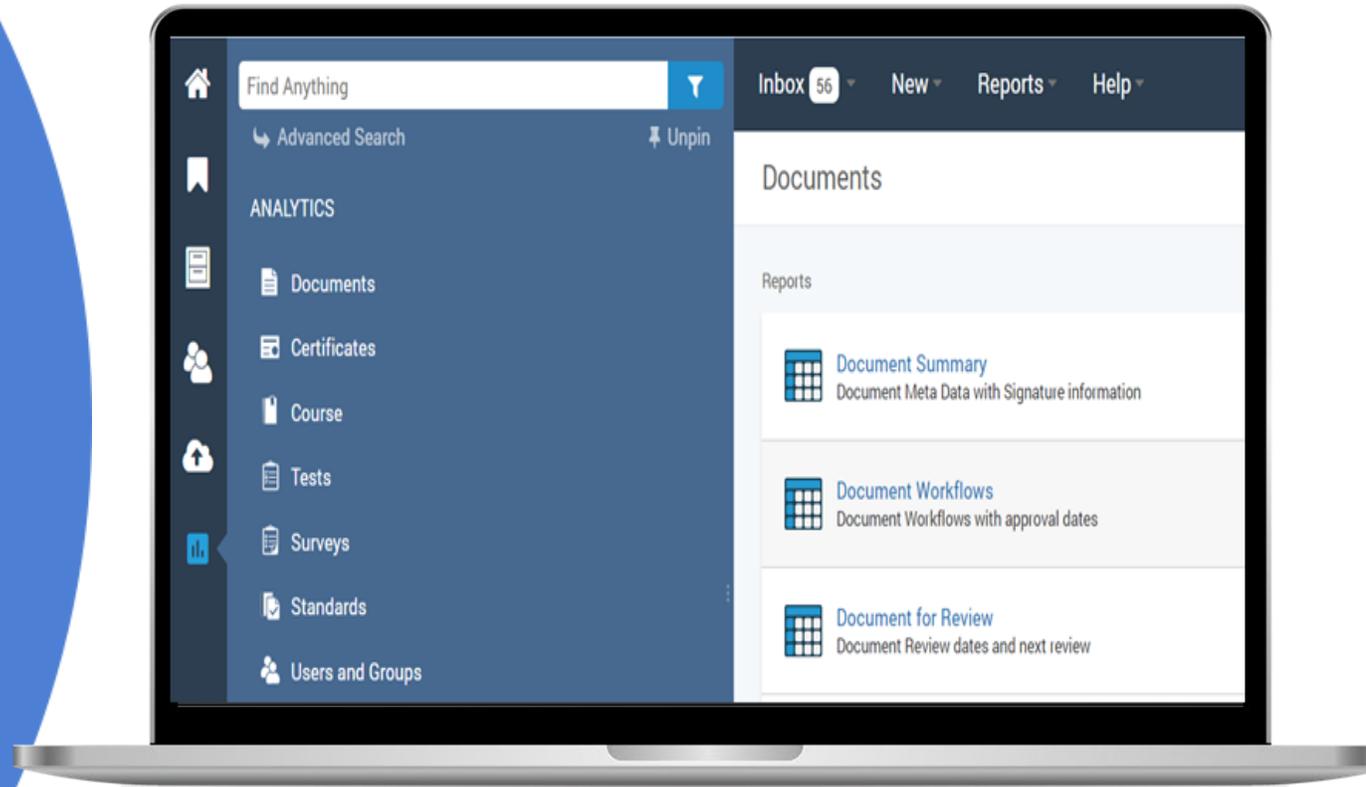
- Navigate to your PowerDMS homepage.
- Select the Reports icon on the far-left dark blue menu.



PowerDMS

Select your Report or Dashboard

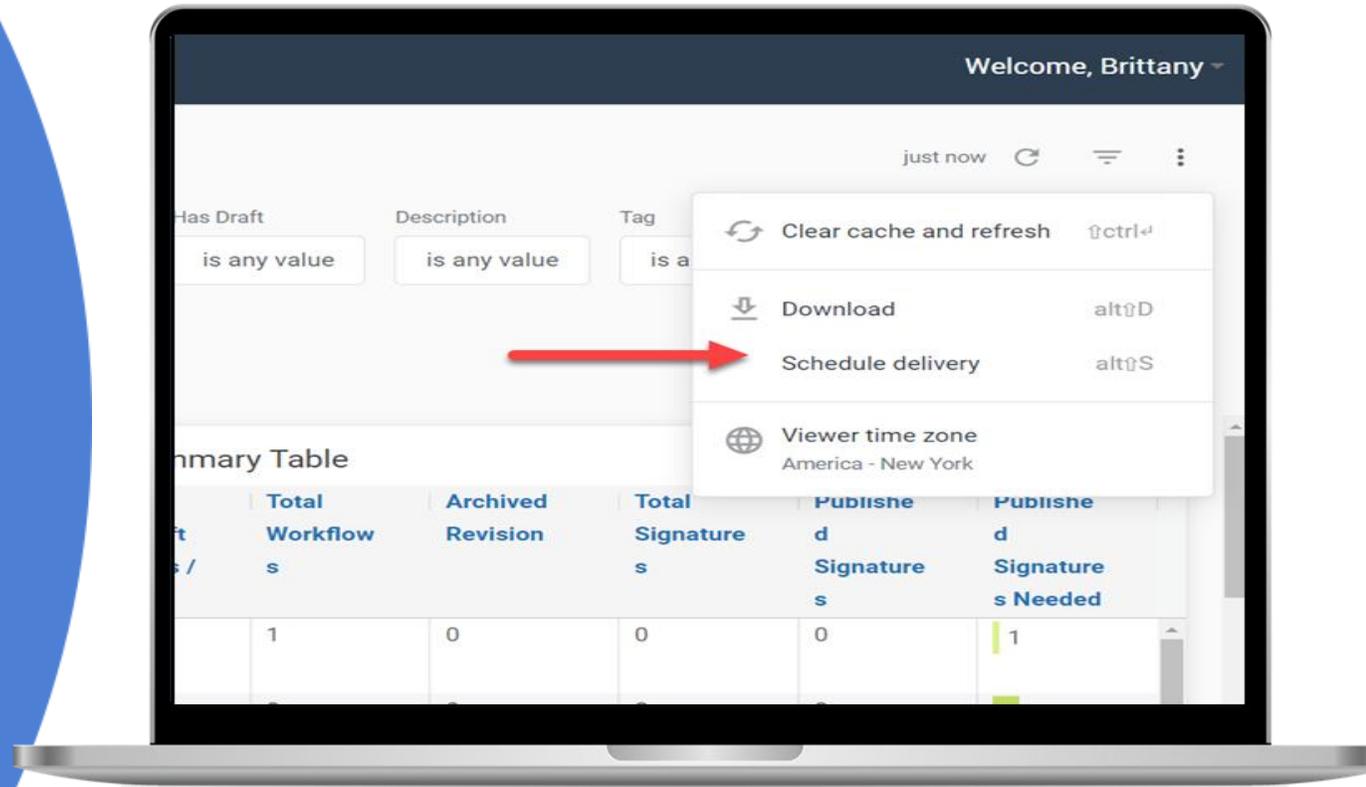
- Select the report or dashboard from the report menu.
- Each report lists summary of information included.



PowerDMS

Scheduling Report Delivery

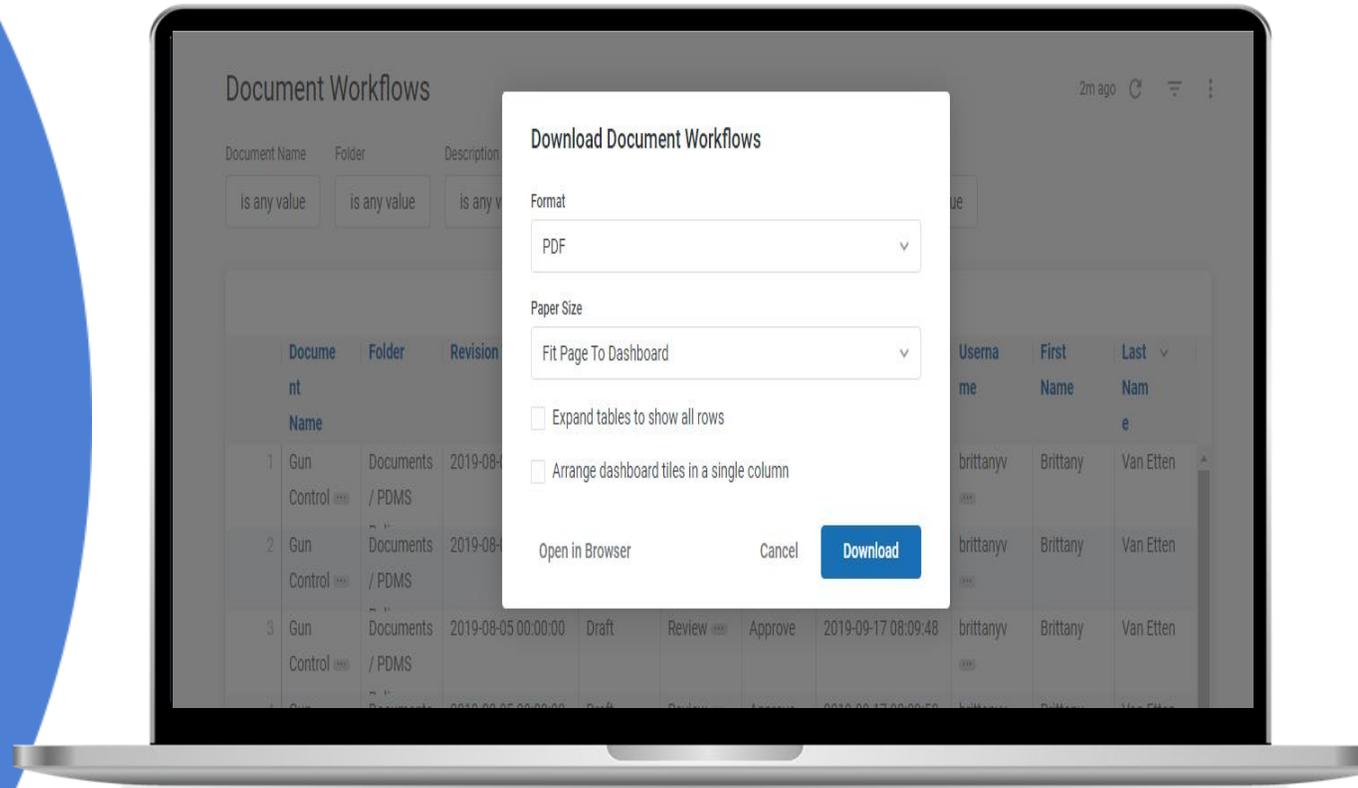
- Once you select the report/dashboard, click the three-dot icon in the upper right corner of the screen and select schedule delivery.
- Navigate through the three tabs settings, filters and advanced options to set up your timing, filtering options and any other applicable options.



PowerDMS

Downloading Report

- Once you select the report/dashboard, click the three-dot icon in the upper right corner of the screen and select Download.
- Choose your format, paper size and apply additional criteria
- Note: Always Click box to expand tables to show all results (1000 limit within web app)



Scenario 1:

You are a new PowerDMS administrator and are unsure what privileges your users have in PowerDMS. What Dashboard or Report should you use?



Scenario 1 Resolution:

Navigate to Analytics in PowerDMS>Click Users and Groups>Click Privileges Overview in the Dashboard section



Scenario 2:

You have a new user to enter in PowerDMS. What is the best way to add this user into their group?



Scenario 2 Resolution:

Navigate to the Group and User section from the PowerDMS Homepage. Hover over the three-dot menu beside the group you want to add the user and click Add User.

Enter the mandatory criteria along with any additional information and click save.



Scenario 3:

You want to view all outstanding assignments for your groups and users. What is the quickest way to view outstanding assignments?



Scenario 3 Resolution:

Navigate to the PowerDMS homepage and review the Dashboard.



Support Resources

PowerDMS Support Team: 1-888-959-5158 or support@powerdms.com

Success Community Articles:

- [PowerDMS Analytics](#)
- [Filtering Reports](#)
- [Scheduling & Sending Reports with Analytics](#)
- [Getting Started with PowerDMS University](#)





Questions?