

PowerDMS[®]

Document Management **Simplified**

PowerDMS[®]

Document Management **Simplified**

Uploading and Managing Documents

How PowerDMS Documents work with your compliance process

PowerDMS

Uploading & Managing Documents

OBJECTIVE

In this session you will learn how to create and manage a document in PowerDMS.

Uploading & Managing Documents

We are here to help. PowerDMS has many resources available to you.

- [Getting Started with PowerDMS](#)
- [Webinar Schedule](#)
- [PowerDMS University](#)

Uploading & Managing Documents

[PowerDMS Success Community](#)

- Video Tutorials
- [Recorded Webinars](#)
- Q&A
- How-To
- Best Practices
- [CALEA Specific Resources](#)
- Forum

Uploading & Managing Documents

Conference Learning Opportunities

- Workshop Training Sessions
- SupportLIVE one-on-one sessions

Uploading & Managing Documents

After this session, Users will begin to understand how to:

1. Create a document folder/subfolder in PowerDMS
2. Create a document in PowerDMS
3. Understand document lifecycle (draft, publish, archive)
4. Set document security
5. Use “Edit on Desktop’ to modify a draft revision

Uploading & Managing Documents

6. Assign a document for signature
7. Run a signature report
8. Create an automated review reminder
9. Add a PowerDMS document to an assessment
10. Update a flagged attachment

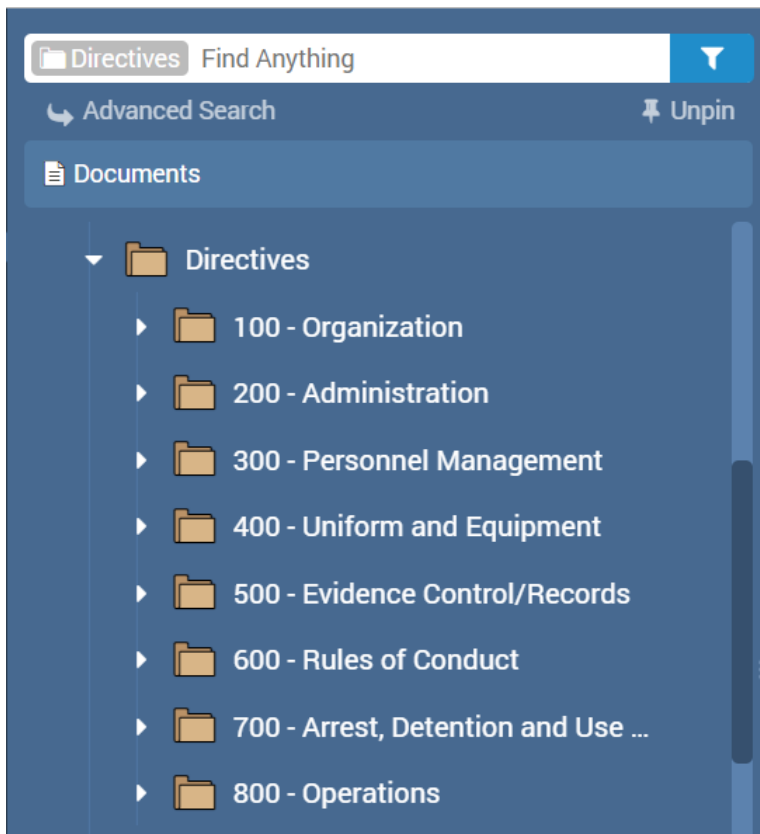
Uploading & Managing Documents

WHY?

What are the advantages of loading my policies, procedures, etc...into the Document side of PowerDMS?

Uploading & Managing Documents

Organizing *(using folders)*



Uploading & Managing Documents

Searching *(indexing)*

Directives 41.2.7

Advanced Search Unpin

Add Filter? CALEA 41.2.7

Results 1 - 2 of 2

Directives / 800 - Operations
Directive 820.11 - Interaction with the M...
...with the Mentally Ill Authorized by: Chief Joe Binns Effective Date: June 15, 2021 CALEA Standards 41.2.7 (6th Edition) 820.11.1 - Purpose The Garner Police Department is committed to treating all persons...
Published: 06/15/2021

Directives / 800 - Operations
Directive 840.01 - Criminal Investigations
...file that is established by the patrol officer is to be forwarded to CID. 840.1.10 – Cold Cases 41.2.7 A. Cold cases shall be designated by the CID lieutenant after all reasonable attempts to solve the...
Published: 08/23/2021

Directives evidence

Advanced Search Unpin

Results 1 - 25 of 42

Directives / 500 - Evidence Control/Records
Directive 510.02 - Collection and Prese...
...Collection and Preservation of Evidence Garner Police Department Written Directive Chapter 500 Control/Records Directive: 510.02 - Collection and Preservation of Evidence Authorized by: Chief Joe...
Published: 06/15/2021

Directives / 500 - Evidence Control/Records
Directive 510.01 - Evidence and Proper...
...Police Department Directive 510.01 Evidence and Property Garner Police Department Written Directive Chapter 500 - Evidence Control/Records Directive: 510.01 Evidence and Property Authorized by: Interim...
Published: 10/06/2021

Directives
500 - Evidence Control/Records

Directives / 500 - Evidence Control/Records
Directive 510.04 - Agency Owned Prop...
...chain-of-command. B. In the event that Town property is found bearing evidence of damage, or is determined to be missing, it will be prima facie evidence that the last person using the property or equipment is responsible...
Published: 06/15/2021

Directives / 500 - Evidence Control/Records
Directive 510.05 - Records Management
...Directive 510.05 - Records Management Garner Police Department Written Directive Chapter 500 Control/Records Directive: 510.05 - Records Management Authorized by: Chief Joe Binns Effective...
Published: 06/15/2021

Uploading & Managing Documents

Accountability *(signatures)*

Directives / 200 - Administration
Directive 210.05 - Oath, Ethics, and Values [View Document](#)

General Revisions Review Standards Assignments **Signatures** Activity Security

Revision: 6/15/2021 (Published) 81 / 82

1 Signature Needed (View Report)

Refresh [Excel] [PDF] [Word]		
Username	Name	Due On
TJONES	JONES, TIMOTHY	

81 Signatures Provided (View Report)

Refresh [Excel] [PDF] [Word]			
Username	Name	Signed	
ABAUER	BAUER, ANDREW	6/23/2021	i

Uploading & Managing Documents

Accessibility

(documents are available from any computer with internet access or mobile device)



Uploading & Managing Documents

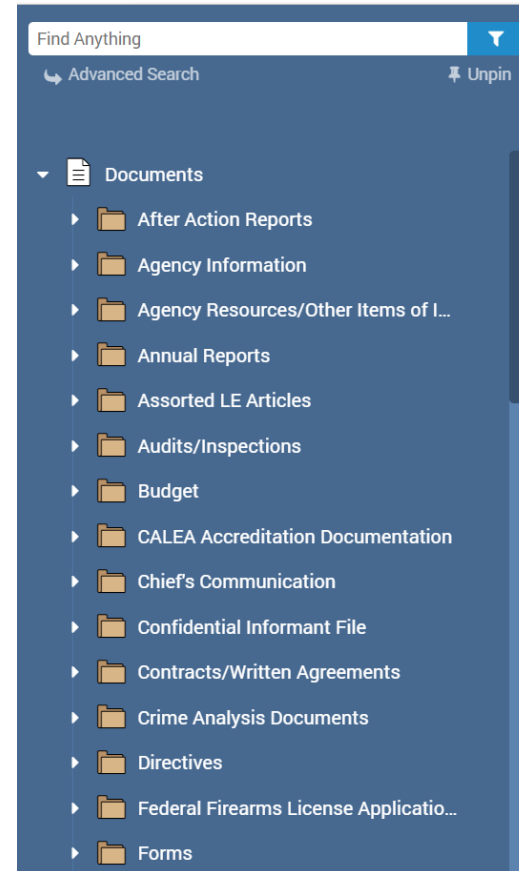
Maintaining Document Lifecycle *(draft, publish, archive)*

The screenshot displays a document management interface for a document titled "Directive 210.05 - Oath, Ethics, and Values" under the category "Directives / 200 - Administration". A "View Document" button is visible in the top right corner. Below the document title is a navigation bar with tabs for "General", "Revisions", "Review", "Standards", "Assignments", "Signatures", "Activity", and "Security". Underneath the navigation bar, three status filters are shown: "Draft (1)", "Published (1)", and "Archived (3)". The "Draft (1)" filter is highlighted with a blue underline, and all three filters are enclosed in yellow boxes.

Uploading & Managing Documents

Storing in Central Repository *(Store more than just policies)*

- | | |
|---|--|
| <ul style="list-style-type: none">• Forms• Recruitment Plan• Agency Goals and Objectives• After Action Report• Special Event Plan• Mutual Aid Agreements• Organizational Chart• Rank/Seniority List• Meeting Minutes• Crime Analysis | <ul style="list-style-type: none">• Job description• Promotional process announcement• Annual analysis• Annual Reviews• Quarterly Audits• Inspections• Lesson Plans• Available Community Resources• Investigative Checklists• Written Evaluation• Tactical Dispatch Plan |
|---|--|



Uploading & Managing Documents

Security

(who can view, report, edit)

The screenshot shows the 'Security' tab of a document in PowerDMS. The document is titled 'QP102.8 - Evidence Control Sop' and is located in the 'Crime Laboratory / Quality Procedure' folder. The 'Security' tab is highlighted in yellow. Below the tab, there is a section for 'Add Users Or Groups' with a search box and a dropdown menu. To the right, there is a table of users and their permissions. The table has three columns: 'View', 'Audit', and 'Edit'. The users listed are: All Users, Chief of Police, Computer CSI, CSI Supervisor, CSI, Deputy Chief 1, Deputy Chief 2, Forensic Chemist, Forensic Lab Director, and NW Patrol Captain. The 'View', 'Audit', and 'Edit' permissions are checked for 'All Users', 'Chief of Police', and 'Forensic Lab Director'. The 'View', 'Audit', and 'Edit' permissions are unchecked for 'Computer CSI', 'CSI Supervisor', 'CSI', 'Deputy Chief 1', 'Deputy Chief 2', 'Forensic Chemist', and 'NW Patrol Captain'. The 'View', 'Audit', and 'Edit' permissions are also unchecked for 'Users And Groups'.

View	Audit	Edit	Users And Groups
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All Users
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chief of Police
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Computer CSI
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CSI Supervisor
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CSI
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Deputy Chief 1
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Deputy Chief 2
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Forensic Chemist
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Forensic Lab Director
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	NW Patrol Captain
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Users And Groups

Uploading & Managing Documents

Secure Storage - <https://www.powerdms.com/trust/faq/> (CJIS Compliant/encrypted/backed up)

Is my data protected in case of a disaster occurring at a data center?

Yes. PowerDMS disaster recovery data availability is ensured in the event of an occurrence, failover to service.

PowerDMS complies with the FBI's Criminal Justice Information Services (CJIS) Security Policy. What does that mean for my organization?

PowerDMS has taken steps necessary to protect criminal justice information maintained by government and civilian agencies. Through data encryption and secure storage, PowerDMS ensures that your data is protected in the event of a disaster.

Where does PowerDMS store and process customer data?

PowerDMS systems for PowerDMS are managed in multiple datacenters through a partnership with Rackspace. These secured SOC 3 certified data centers are located in the United States and have 24/7 security and redundancy on all critical elements (i.e. data, power, environmental controls, and fire suppression).

Is my data encrypted securely?

Yes. All PowerDMS customer data is encrypted in transit and at rest. We ensure a minimum AES-256bit level encryption (FIPS140-2 certified) and at no time is any customer data left in an unencrypted state, including data that has been backed-up.

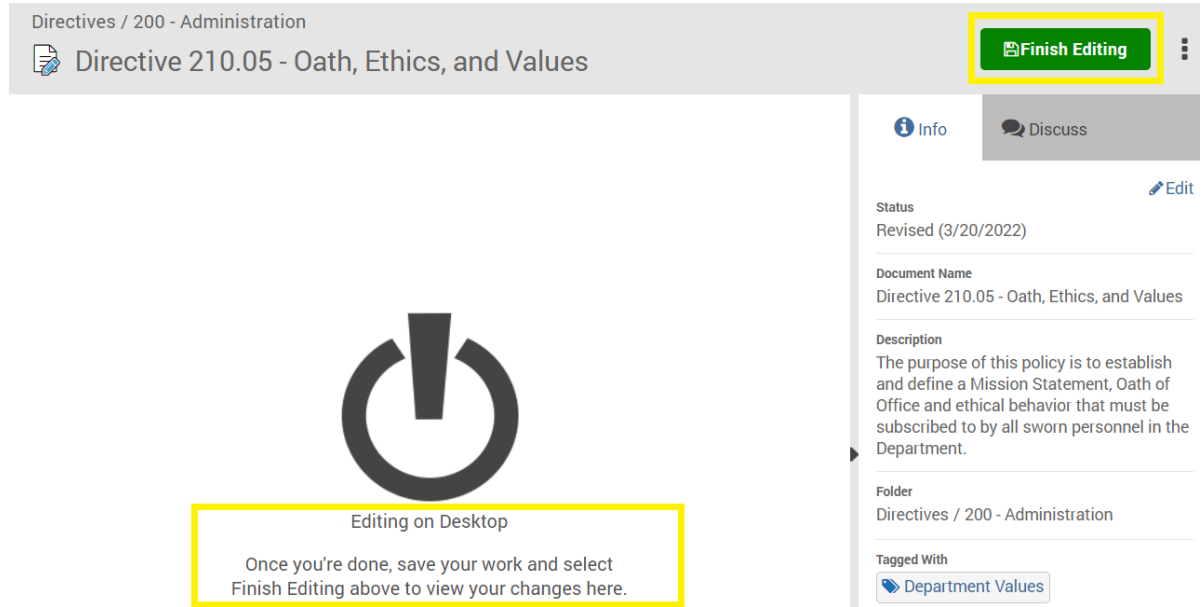
Is my data backed up? Is it backed up off-site?

Yes. Customer data is backed up in secure systems both on-site and off-site. In addition, PowerDMS.com includes a feature that your site administrators can use to extract your data from directly within the application.

Uploading & Managing Documents

Editing

(modifying a draft revision)



Directives / 200 - Administration
Directive 210.05 - Oath, Ethics, and Values

Finish Editing

Info Discuss

Status
Revised (3/20/2022)

Document Name
Directive 210.05 - Oath, Ethics, and Values

Description
The purpose of this policy is to establish and define a Mission Statement, Oath of Office and ethical behavior that must be subscribed to by all sworn personnel in the Department.

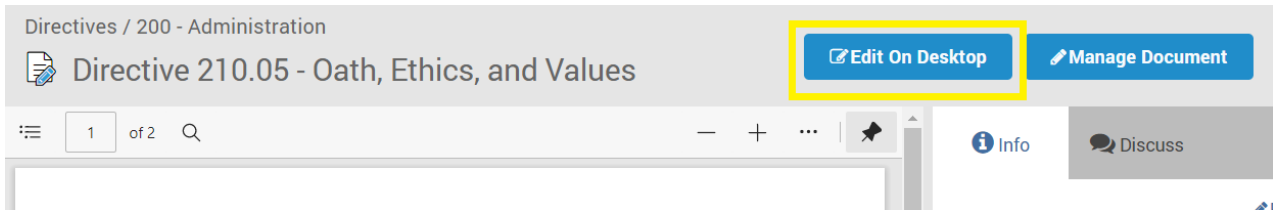
Folder
Directives / 200 - Administration

Tagged With
Department Values



Editing on Desktop

Once you're done, save your work and select Finish Editing above to view your changes here.



Directives / 200 - Administration
Directive 210.05 - Oath, Ethics, and Values

Edit On Desktop **Manage Document**

1 of 2

Info Discuss

Uploading & Managing Documents

When a document is uploaded into PowerDMS and then attached to an assessment, a relationship/link is created between that document and the standard(s) it is attached to.

Document Side

Info Discuss

- NCGS 15A-505
- NCGS 7B-1604
- NCGS 7B-500
- NCGS 7B-501
- NCGS 7B-401
- Juvenile Court Services
- NC Division of Social Services
- General Investigator
- Records Manager
- Community Services Sergeant
- Criminal Investigations Division
- Community Services Unit
- NC Attorney General

Related Standards
42.1.3 (LE1), 44.2.4, 44.2.3 (LE1),
44.2.2 (LE1), 44.2.1 (LE1), 44.1.3,
44.1.1 (LE1)

Assessment Side

44.1.1 (LE1) Print

(M M M M) (LE1) Juvenile Operations Policy

A written directive describes the agency's juvenile operations function.

Commentary

Atch	Hlt
-	-
4	12
-	-

Filters: None Applied

- WD.1 GPD Directive 840.05 Accreditation Manager
- 840.05 - Juvenile Operations
- 840.5.4 - Organization and Administration of Juvenile Operations function

Uploading & Managing Documents

Assessment

*(Always know you have the most current version attached.
When you update the attachment, you do not have to
re-attach and re-highlight)*

46.1.2 (LE1)

Print

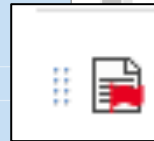
(M M M M) (LE1) All Hazard Plan

The agency has a written All Hazard Plan for responding to critical incidents. The plan will follow standard Incident Command System (ICS) protocols, which include functional provisions for: command, operations, planning, logistics, and finance/administration.

Commentary

The Incident Command System has proven very effective in law enforcement and fire services emergencies. This system permits a clear point of control and can be expanded or contracted with ease to escalating or diminishing situations. The Federal Emergency Management Agency's (FEMA) ICS is comprehensive, available on the Internet, and widely used in critical incidents such as natural and man-made disasters, pandemics, civil disturbances, mass arrests, bomb threats, hostage/barricaded person situations, acts of terrorism, and other

Atch	Hlt
3	-
4	15
-	-
-	-



Filters: None Applied

WD.1 GPD Directive 810.07
Accreditation Manager

- 810.07 - Unusual Occurrences/Critical Incidents
- 810.7.1 - Purpose
- 810.7.2 - Definition of Civil Disturbance
- 810.7.2 - Definition of Man-made Disaster
- 810.7.2 - Definition of Natural Disaster
- 810.7.3 - Critical Incident Policy and Resources (All Hazard Plan)
- 810.7.3(C) - Written plans and resources available
- 810.7.5 - Responsibilities for Command Function

Uploading & Managing Documents

1. Create a document folder in PowerDMS

PowerDMS Success Community Resources:

- [Creating and Assigning Document Folders](#) How-To

Uploading & Managing Documents

2. Create a document in PowerDMS

PowerDMS Success Community Resources:

- [Uploading a Document video](#)
- [Uploading Documents in PowerDMS How-To](#)
- [Creating Microsoft Office Documents in PowerDMS How-To](#)

Uploading & Managing Documents

3. Assign a document for signature

PowerDMS Success Community Resources:

- [Assigning a Document for Signature](#) How-To
- [Document Tool: Compare to Last Revision I Signed](#) How-To
- [Signing a Document](#) How-To

Uploading & Managing Documents

4. Set document security

PowerDMS Success Community Resources:

- [Security - Documents](#) How-To

Uploading & Managing Documents

5. Run a signature report

PowerDMS Success Community Resources:

- [Running Reports Using PowerDMS Analytics](#) How-To
- [Running Reports](#) How-To
- [What information can I expect from document reports?](#) Q&A

Uploading & Managing Documents

6. Understand document lifecycle (draft, publish, archive)

PowerDMS Success Community Resources:

- [PowerDMS Policy: Best Practices](#) How-To
- [Revising and Republishing a Document](#) How-To
- [Deleting or Archiving a Document in PowerDMS](#) How-To

Uploading & Managing Documents

Additional Resources

- [Naming Documents](#) How-To
- [Acceptable File Types and Other Helpful Hints](#) How-To
- [Installing PowerDMS Author](#) How-To
- [Creating and Using Form Templates](#) How-To

Uploading & Managing Documents

Additional Resources

- [Linking Documents within PowerDMS](#) How-To
- [Linking Documents in PowerDMS](#) Video
- [I uploaded the wrong file into PowerDMS. Can I replace it?](#) Q&A
- [How do I locate a disabled or archived item in PowerDMS?](#) Q&A

Uploading & Managing Documents

Additional Resources

- [PowerDMS Security Definitions How-To](#)
- [What is a document timer, and when should I use it? Q&A](#)
- [Printing and Downloading Documents How-To](#)
- [Converting and Exporting Documents How-To](#)

Uploading & Managing Documents

Additional Resources

- [Setting Up “Inbox Sign All” on your PowerDMS Site](#) How-To
- [Signing All Documents in your Inbox](#) How-To
- [Understanding Tags](#) How-To
- [Customizing Code Tables](#) How-To
- [PowerDMS Mobile](#) How-To

Uploading & Managing Documents



Documents and Workflows

Please complete the survey in the CALEA app

PowerDMS ProServices:

- Remote Training
- Onsite Training
- Document Upload

Email us for additional information or for a quote training@powerdms.com