

PowerDMS Training Workshops

Rocky Mount Training Schedule

DAY ONE – April 25th

- 8:30 – 9:00 **Welcome:** Review of training agenda, logistics
- 9:00 – 9:45 **Site navigation and Administration Menu**
- 10:00 – 11:00 **Creating users/groups:** Manually adding a new user/group, setting user/group security, User sync tool, archiving users.
- 11:15 – 12:30 **Leveraging the Dashboard, Advanced security settings** – Linking Functionality
- 12:30 – 2:00 **LUNCH**
- 2:00 – 3:00 **Document creation:** Creating folders/subfolders, creating documents, setting up folder/document security, making assignments, reporting.
- 3:15 – 4:15 **Document revisions:** Editing various document versions, using the PowerDMS Author tool, tracking the document lifecycle, setting up a document review schedule.
- 4:30 – 5:30 **Document Workflows:** Creating review and approval workflows, understanding response types, ways to participate to include providing comments and/or making edits, reporting, searching for closed workflows and comments.

DAY TWO – April 26th

- 8:30 – 9:00 **Welcome:** Review of training agenda, logistics, questions from previous day
- 9:00 – 9:45 **Accessing the Standards Manual:** Requesting membership to a standards community, subscribing to the standards manual, comparing versions of the manual, setting manual security
- 10:00 – 11:00 **Creating an assessment:** Adding users/groups to the assessment, granting participate/observe rights, setting initial statuses, creating tasks at the standard level or in bulk, upgrading an assessment.
- 11:15 – 12:30 **Adding attachments:** Loading various attachments (File upload, PDMS document, Simple Note, New Rich Text), highlighting and labeling attachments,
- 12:30 – 2:00 **LUNCH**
- 2:00 – 3:00 **Attachments continued:** Editing, reordering, copying, removing, filtering, and searching for attachments.

- 3:15 – 4:15 **Preparing for Mock/CSM/Final Reviews:** Adding users/groups. providing appropriate rights to the assessment, reviewing comments, running status reports, CALEA 20% calculator
- 4:30 – 5:30 **Transitioning to a new assessment:** Closing an assessment, creating a new assessment, copying attachments between assessments, copying tasks, accessing archived versions of assessments.

DAY THREE – April 27th

- 8:30 – 9:00 **Welcome:** Review of training agenda, logistics, questions from previous day
- 9:00 – 9:45 **Creating Surveys:** Question types, anonymity options, direct assignment v. adding to a course, reporting, archiving.
- 10:00 – 11:00 **Creating Tests:** Question types, mandatory v. optional inclusion, test bank capability, grading options, direct assignment, attaching to a document, adding to a course, reporting, archiving.
- 11:15 – 12:30 **Creating Certificates:** Setting up folders in the code tables, adding new certificates, adding hours, adding properties, creating recurrences, making assignments, attaching to a course, adding a certificate, creating a template, running reports.
- 12:30 – 2:00 **LUNCH**
- 2:00 – 3:15 **Creating a course:** Setting up master course, adding sections, adding content (File upload, PDMS document, New Rich Text, Test, Survey, Off-line), grading options, adding assignments and enrolling users, printing a course roster, awarding certificates, reporting, cloning sections, archiving sections and master course.
- 3:30 – 4:30 **Preparing for Mock/CSM/Final Reviews:** Adding users/groups. providing appropriate rights to the assessment, reviewing comments, running status reports, CALEA 20%, calculator