

Uploading Documents In PowerDMS

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In order to upload a document into PowerDMS, select **New** from the top menu bar, then select **Document**. **Drag and drop** your document from the file location into the box on the New Document window.

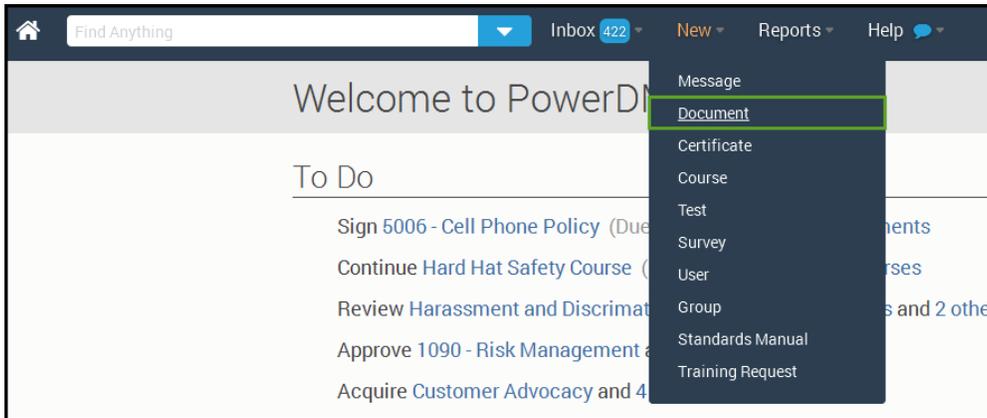


Figure 1: Selecting New Document from menu

Note: Drag and drop is available in all supported browsers (Firefox, Google Chrome and Internet Explorer 9 or greater), if you are using Internet Explorer 9, select on the green plus sign and browse out to locate your document.

Note: When you create a new document in PowerDMS - PowerDMS will display the document to your users as a PDF.

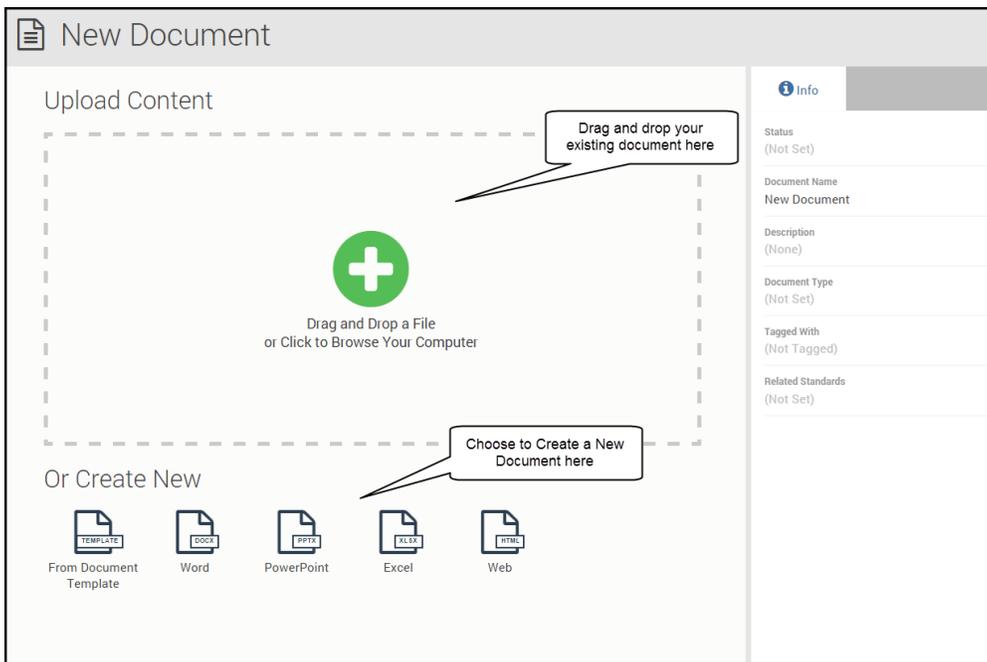


Figure 2: Create new document in PowerDMS

Once you have uploaded your document, you will be prompted to either download or start PowerDMS Author.

What is PowerDMS Author

PowerDMS Author is a tool that is installed on your local computer that helps PowerDMS communicate with your Microsoft Products (Word, Excel and PowerPoint). When you edit a document from PowerDMS, you will be modifying your document from the comfort of your Microsoft Office products that you are familiar with, when you select Save and close the document,

PowerDMS keeps the changes and tracks them for you within the system.

PowerDMS Author enables PowerDMS to give your users comparison ability on documents and helps you track edits between users in an approval workflow.

Installing PowerDMS Author

If PowerDMS Author is not running on your computer, or this is your first time creating a document in PowerDMS, you will be prompted to download PowerDMS Author as shown below.

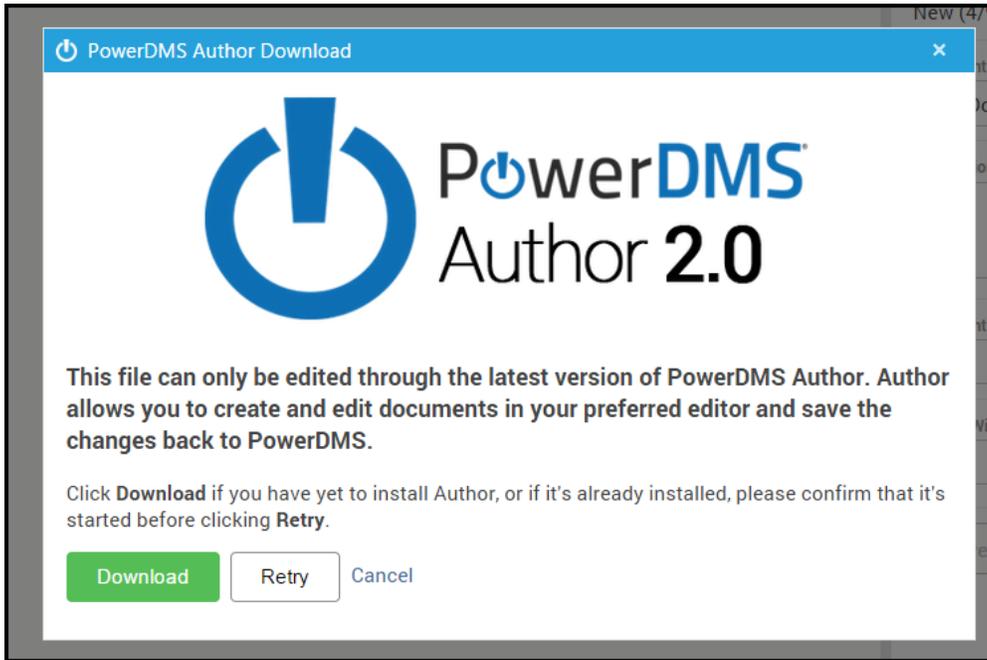


Figure 3: Downloading PowerDMS Author

When this box appears, select **Download**, and follow the instructions to install PowerDMS Author. If you already have PowerDMS Author on your computer, you may need to start it up by selecting on your Start Menu, then typing in PowerDMS Author, and clicking on it to start it. When PowerDMS Author is running, a Power symbol will appear in your system tray as shown in the images below. Once PowerDMS Author is running, select **Ready to Pair**

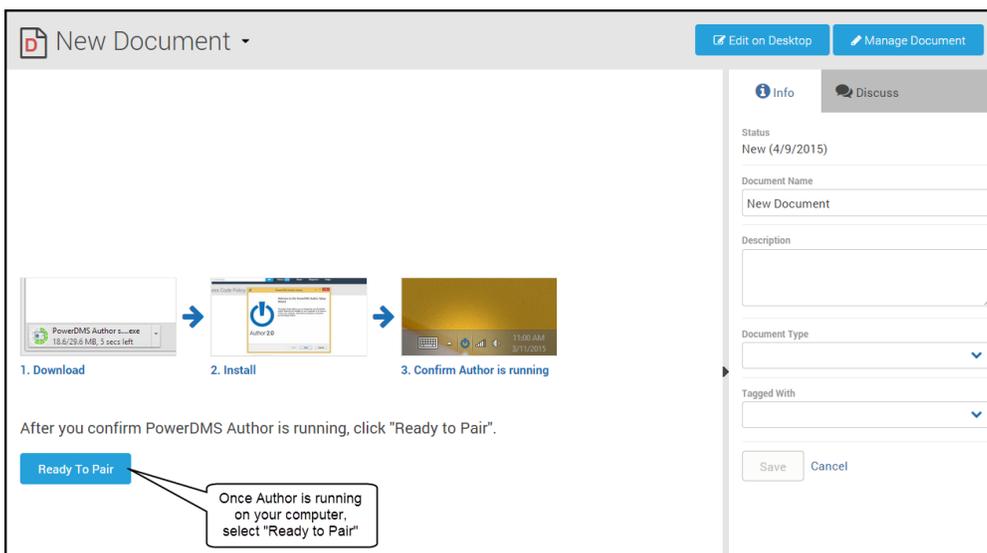


Figure 4: Installing PowerDMS Author

Once your PowerDMS is paired, the Microsoft tool that you chose will launch, and you can begin editing your document

right from your desktop. While your document is being edited, you will see the following in the document window of PowerDMS.

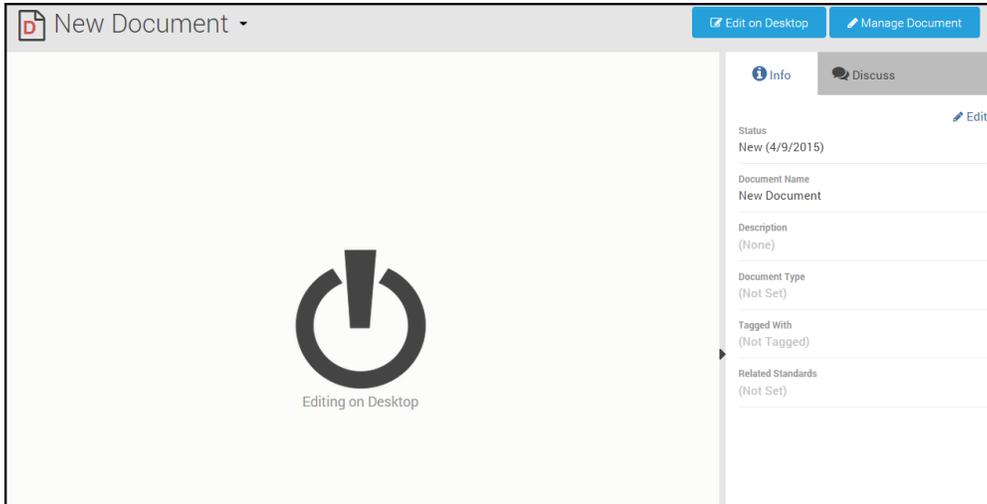


Figure 5: Editing on Desktop

Once you have created, and or edited your document, select **Save** and exit or close the document. PowerDMS will display the new version of the document in your document window.

Edit Your Document Info

On the right side of your document record is an info tab that contains all of the information about your document that your users will be using to search for the document. Select **Edit** to modify this information to include the Document Name, Description, Document Type and Tagged with; be sure to select **Save** when you have finished.

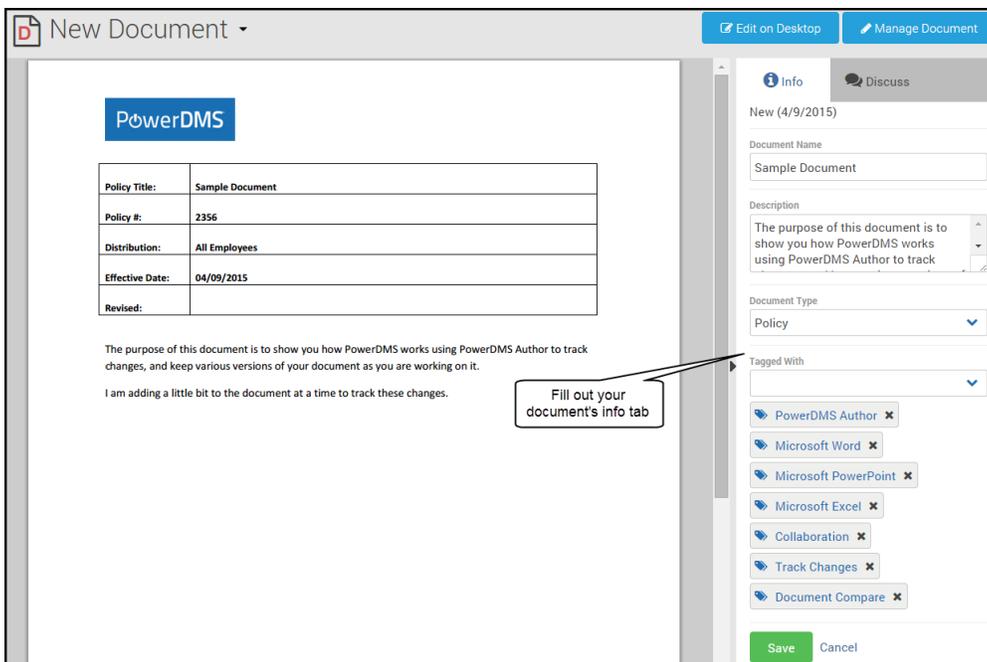


Figure 6: Completing the Document Info tab

What do I do next?

Well, that's up to you! You can use the document menu to either

- **Start a New Workflow** to collaborate on your document for approval, or you may

• **Publish Your Document** - making it available for users to search for

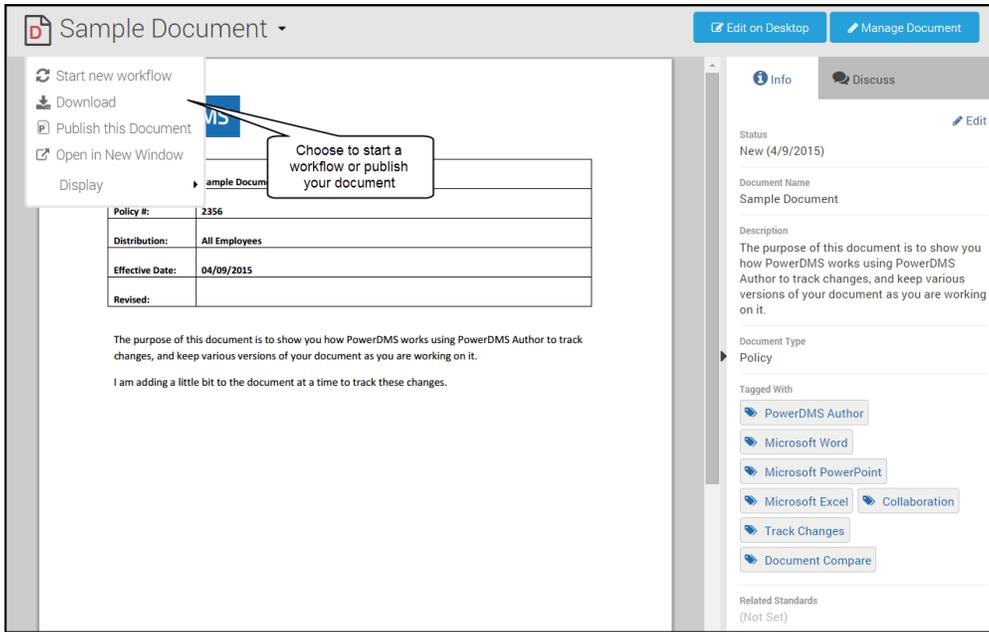


Figure 7: Document Menu