



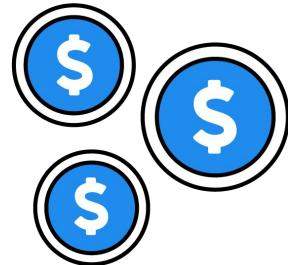
SUNY College at Old Westbury

Welcome

Why invest in technology?

It's no longer "nice to have"

We need technology that helps us support our staff, better serve our community, limit liability, and operate with excellence to address...



Rising Liability Costs



Looming Staff Shortages



Decreased Wellbeing

Our Current Challenges



Decentralized processes

- Duplicated information
- Costly Paper process
- Extra time from manual tasks
- No formal process and procedure
- No easy access to information
- Version and access control risks

Our outdated processes aren't sustainable.

We need tools that help us **do more with less.**



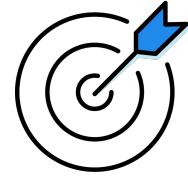
Our Proposed Solution





Policy Workforce Management

built to...



Ensure Excellence



Build Public Trust



**Improve Department
inefficiencies**

Our Mission

Our Mission is to help our customers increase trust and efficiency by simplifying how they share and manage crucial information

Today more than 5,000 organizations, in both the public and private sectors, trust our cloud-based software to help them reduce liability, drive accountability, increase corporate compliance, and improve safety.



What's Included?



Policy

Policy and critical document management

Manual and paper processes introduce a lot of risk and uncertainty into our agency.

With PowerPolicy we will be able to:

- **Reduce risk** with documented evidence that staff have read, understood, and signed all critical policies and procedures.
- **Save thousands of dollars** by eliminating the cost of paper and revising policies and documentation 4x faster (staff time savings).
- **Empower staff** by keeping them well informed with anytime/anywhere access to job critical documentation.



Policy

College Station Fire Department (TX)

**SAVE
\$150,000
PER YEAR**



administrative cost savings

"We keep our entire SOP manual and all our protocols in PowerPolicy. You can easily edit the document, hide a draft until you are ready to publish, and more. It's an awesome tool."

- Greg Rodgers, Battalion Chief



Single Source of Truth

With PowerDMS, you can import, connect, create, distribute, & track any crucial information, content, & training.

Creating a single source of truth for access, assignments, management, distribution, tracking, and reporting.

The screenshot displays the PowerDMS software interface. On the left, there is a sidebar with icons for Home, Advanced Search, Unpin, Documents (with subfolders like BOLOs, Bulletins, Checklists, Daily Briefs, DORs, Forms, Maps/Floorplans, Policies, Procedures, Standards Manuals, Assessments, Certificates, Courses, Tests, and Surveys), and a Cloud icon. The main area has a dark header with "Inbox 574", "New", "Reports beta", and "Help". The top right shows "Welcome, Brad". Below the header, it says "Your Agency Name Here". The main content area is divided into sections: "To Do" (with tasks like "Sign G.O. 3.01 - Use Of Force - General", "Sign Policy - Covid-19 Continuity Of Operations Plan", and "Approve G.O. 3.06 - Vehicle Pursuits"), "Completed Today" (with items like "Voted on Sexual Harassment Policy." and "Acquired a;ldkjga;lkgh;lk"), and a "Dashboard" section with tabs for Users, Groups, Documents, Workflows, Training, and Assessments. Under the Dashboard tab, there is a document titled "Corporate Governance Guidelines" with the status "Approval: Waiting on step 1 for 3 years 1 comments" and a progress bar showing "Step 1 of 3". To the right, there is a "Top Rated 2021" badge and an "About" section with a description of the software's features.

Integrations & Import

Upload & edits made easy with simple drag-&-drop import and integrations to Microsoft Office, Office365, One-Drive, & Google Drive.

The screenshot displays the PowerDMS interface, which includes two main sections: 'CREATE NEW' and 'UPLOAD FROM'.

CREATE NEW: This section contains five icons for creating new documents from different sources:

- From Document Template (Icon: plus sign)
- Word (Icon: document with 'W')
- PowerPoint (Icon: document with 'P')
- Excel (Icon: document with 'X')
- Web (Icon: document with '</>')

UPLOAD FROM: This section shows two cloud storage integration points:

- Google Drive (Icon: multi-colored triangle)
- One Drive (Icon: blue cloud)

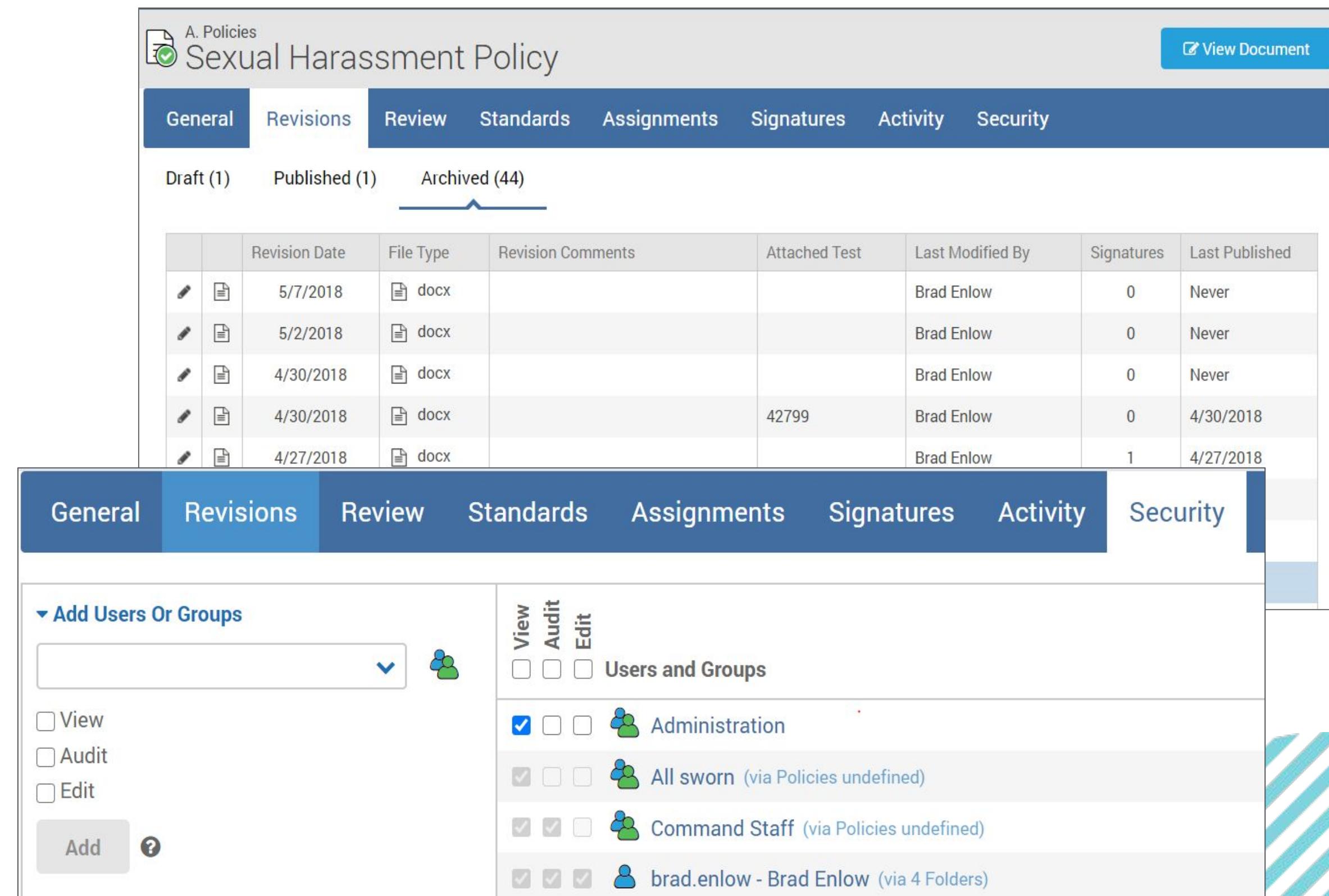
Central Interface: The main interface features a navigation bar at the top with links for 'Find Anything', 'Inbox 661', 'New', 'Reports', and 'Help'. Below the navigation bar, there's a 'Documents New Document' section. A large dashed-dotted area is provided for dragging and dropping files. A green circular icon with a white plus sign is present, accompanied by the text 'Drag and Drop a File or Click to Browse Your Computer'. At the bottom right of this section, there's a link 'Add/Manage Integrations'.

Bottom Navigation: A decorative footer bar at the bottom features diagonal teal and white stripes.

Access & Control

PowerDMS includes automatic version control features. When a new document is updated and approved, the previous version is archived and the new version is published.

Admins control who can view, audit, and edit specific folders and items to ensure complete access control & security.



The screenshot displays two main sections of the PowerDMS interface:

Top Section (Document Overview):

- Title:** Sexual Harassment Policy
- Status:** General tab is selected, showing Draft (1), Published (1), and Archived (44) versions.
- Actions:** View Document button.

Bottom Section (Access Control):

- General Tab:** Shows a table of document revisions with columns: Revision Date, File Type, Revision Comments, Attached Test, Last Modified By, Signatures, and Last Published.
- Revisions Tab:** Shows a detailed view of the document's revision history.
- Security Tab:** Shows access control settings for users and groups, with checkboxes for View, Audit, and Edit permissions.

	Revision Date	File Type	Revision Comments	Attached Test	Last Modified By	Signatures	Last Published
	5/7/2018		docx		Brad Enlow	0	Never
	5/2/2018		docx		Brad Enlow	0	Never
	4/30/2018		docx		Brad Enlow	0	Never
	4/30/2018		docx	42799	Brad Enlow	0	4/30/2018
	4/27/2018		docx		Brad Enlow	1	4/27/2018

Access Control (Security Tab):

- Add Users Or Groups:** Input field and Add button.
- Permissions:** View, Audit, Edit checkboxes.
- Users and Groups:** Administration, All sworn, Command Staff, brad.enlow - Brad Enlow.

Side-by-Side Comparison

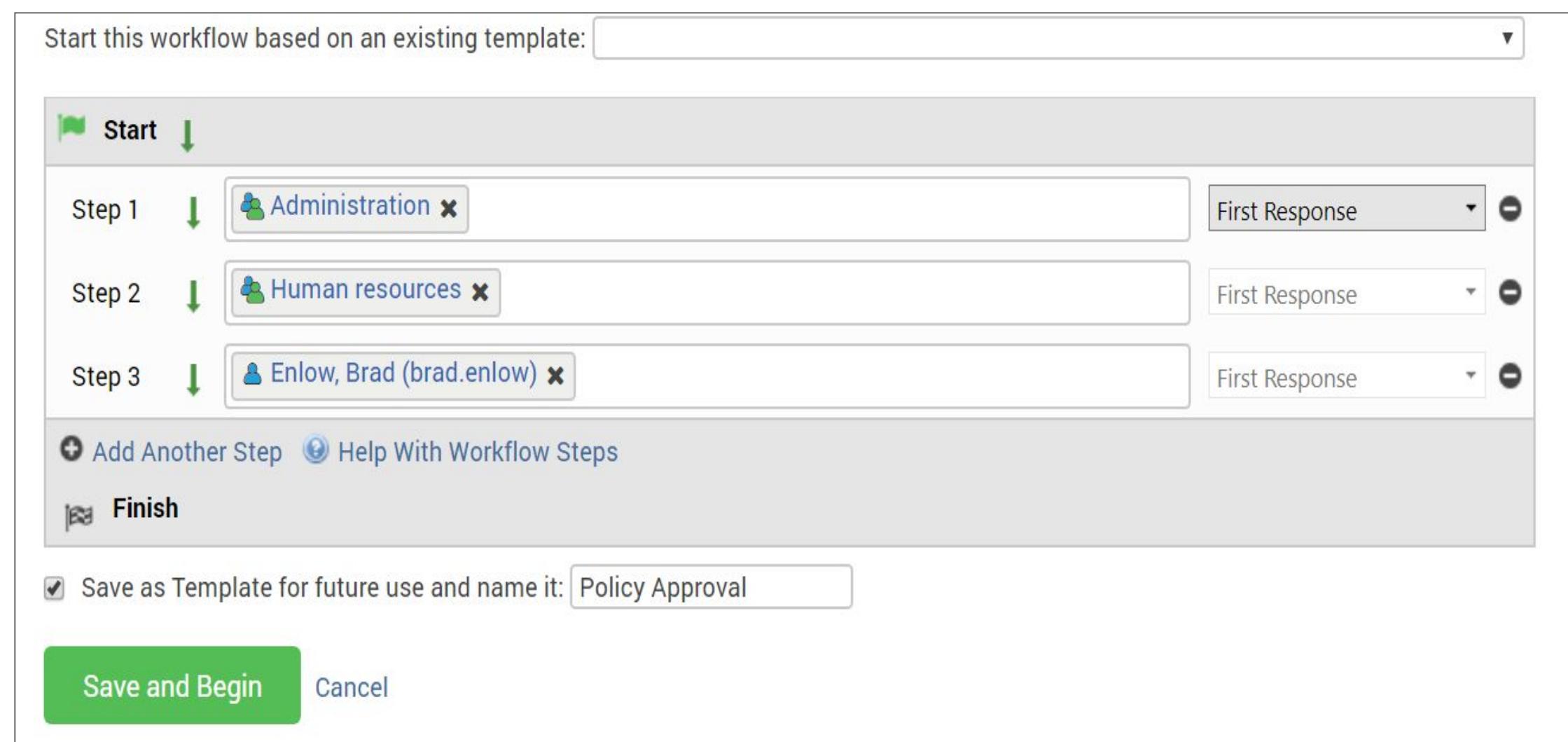
PowerDMS provides a unique side-by-side comparison feature allowing users to compare edits and updates of any version, highlighting what has been added, deleted, or revised.

The screenshot shows the PowerDMS interface with a 'Comparing files' window. The window title is 'Comparing files' and it displays two versions of a 'Sexual Harassment Policy'. The left panel shows the original policy with sections for 'Purpose' and 'Sexual Harassment Defined'. The right panel shows the updated policy, where the 'Sexual Harassment Defined' section has been modified, with new text highlighted in green and some text removed in red. The interface includes a toolbar at the top with buttons for 'Change 0 of 4', 'Last Signed', 'Side by Side' (which is selected), 'Published', and 'Scroll Lock'.

Workflows

PowerDMS simplifies the development and approval process, allowing admins to set a routing structure for document collaboration & approvals.

You can also create standard workflow templates to ensure consistent business processes.



Schedule Periodic Reviews

Schedule one-time or recurring reviews by date or simply by the last review to ensure documents are kept updated and in compliance.

The screenshot shows the 'Review' tab selected in a navigation bar with tabs for General, Revisions, Review, Standards, Assignments, Signatures, Activity, and Security. Below the tabs is a 'Settings' section. Under 'Review', there are three options: 'Never' (radio button), 'On This Date' (input field with a calendar icon), and 'Every 1 Years From Last Review Date' (radio button selected). A note below states: 'Note: PowerDMS will ONLY start a new review on the scheduled date if you chose a template.' The 'Workflow Template' dropdown is set to 'Annual Compliance Review' with a 'Create New Template' link next to it. At the bottom, the 'Last Reviewed Date' is listed as '5/24/2020' and the 'Next Review Date' is listed as '5/24/2021 Log New Review'. A green 'Save Settings' button is at the bottom right.

Audit Trail

A complete history of every version of every item is logged & tracked, including views, signatures, versions, reviews, approval/comments, & status.

The screenshot shows the PowerDMS interface for a 'Meeting Minutes Template'. At the top, there's a navigation bar with tabs: General, Revisions, Review, Standards, Assignments, Signatures, Activity (which is selected), and Security. A blue button labeled 'View Document' is in the top right. Below the tabs, there are search filters: 'Activity Types: All Types', 'User: [dropdown]', and date range fields 'Between: [date] and [date]'. There are also 'Search' and 'Reset' buttons. The main area is a table showing audit log entries:

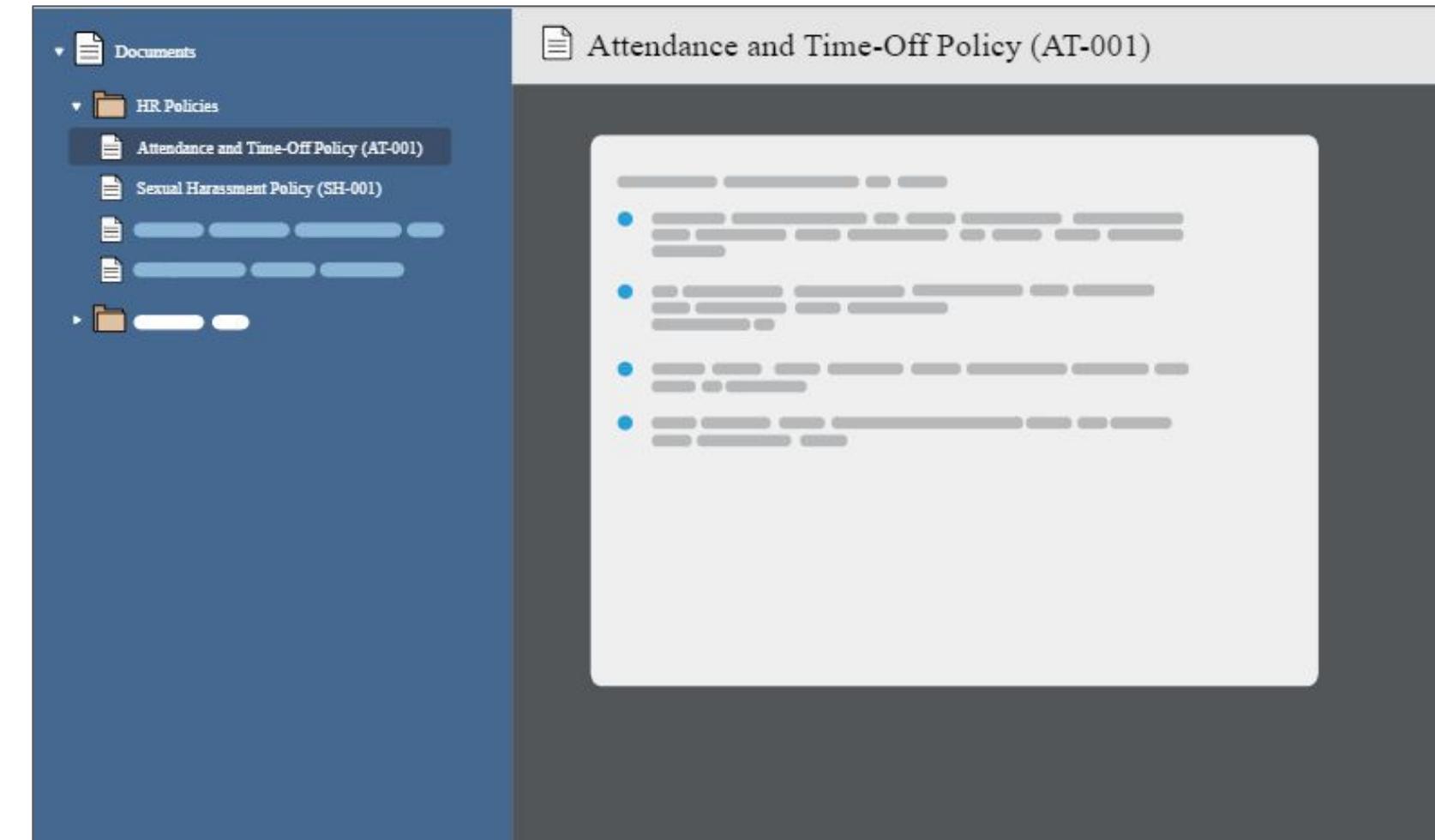
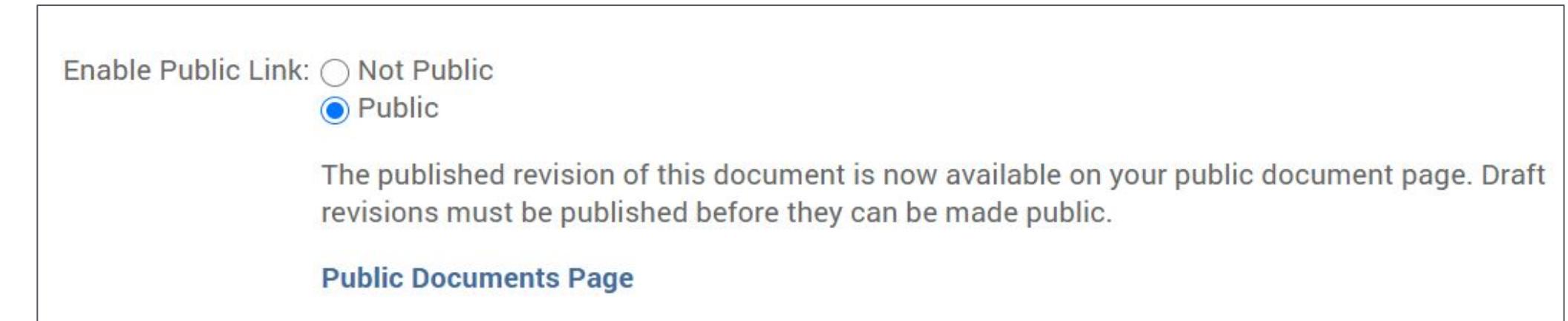
User	Activity	Activity Date	Revision Date	Status	Details
John Smith	Revision Status Change	11/21/2018 1:40 PM	11/21/2018 1:39 PM	Status changed from: Draft to Publish	
John Smith	Revision Created	11/21/2018 1:39 PM	11/21/2018 1:39 PM		
John Smith	File Saved	11/21/2018 1:39 PM	11/21/2018 1:39 PM		
John Smith	Document Created	11/21/2018 1:39 PM			

At the bottom, there are navigation icons (back, forward, first, last), page numbers (1 of 1), and buttons for 'Page size: 4' and 'Change'. A footer note 'Item 1 to 4 of 4' is at the bottom right.

Public Facing Documents

Securely select and instantly publish specific policies, records, videos, forms or information directly to your website.

Automatic updating to your website when a new version is published within your PowerDMS site.



Reports & Dashboards

Generate custom reports to quickly find records of both current & past employees related to any item or training.

Custom dashboards Keep admins informed of key areas, staff, or groups that are falling behind.

The screenshot shows a dashboard with several tabs: Users, Groups, Documents, Workflows, Training, and Assessments. The Training tab is selected. Three workflow items are listed:

- 09-14 - Legal Training 05/18/2009: Review. Waiting on step 1 for 3 years 1 comments.
- College Of Lake County (2): Approval. Waiting on step 1 for 3 years.
- Redline (Ucsf 10202017 Vs Powerdms 10192017) Attachment A: Approval. Waiting on step 1 for 3 years 1 comments.

A tooltip for the first workflow item provides more details: "Workflow initiated by Tony Purstell on Oct 6 2017. Waiting on SAM Doe and 2 others for 3 years. Go To Workflow".

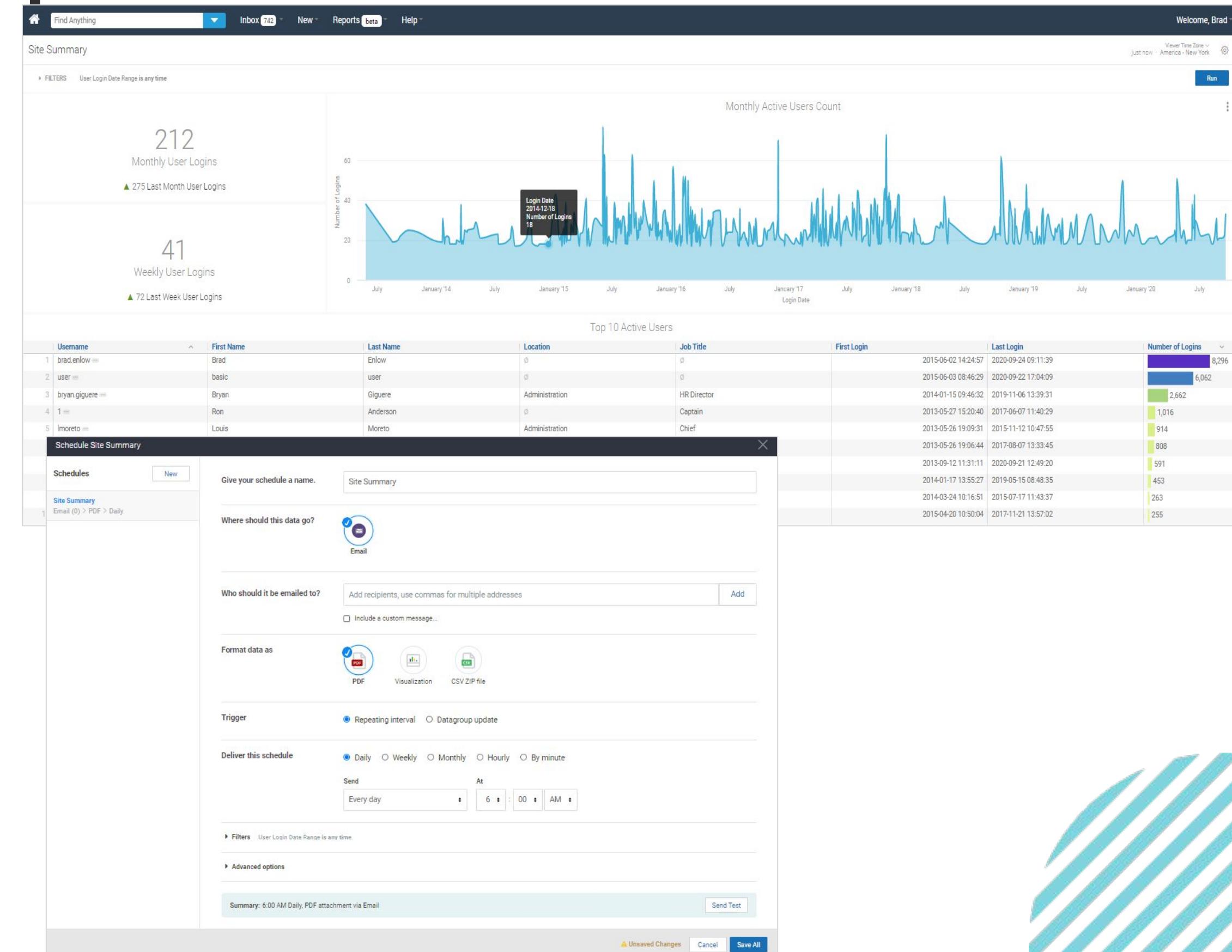
The screenshot shows the Report Builder interface with the following sections:

- Report Type:** Student Records (radio button selected), Credit Hour Summary, Attendance Summary, Course Summary, Instructor Credit Hours, Instructor Sections, Fees Summary.
- Add Criteria:** Course (dropdown), Course Type (dropdown), Status (checkboxes: Pass, Fail, In Progress, Pending Grade, Pending Approval, Not Started), Started Date Range, Completed Date Range.
- Filter Options:** Show Recordless Users (checkbox), User (dropdown), Location (dropdown), Job Title (dropdown), Member of Group (dropdown), Include Archived Users (checkbox), Tagged With (dropdown).
- Action Buttons:** View, Download.

Analytics & Scheduled Reports

Pull select data into **custom dashboards with visuals** that can be presented in a format of your choosing.

Schedule tailored reports with selected information to be emailed to any user/group on a recurring basis.



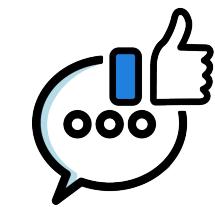
Why PowerDMS®?

by NEOGOV



Solutions

A comprehensive platform of solutions and are constantly adding new innovative products to their portfolio.



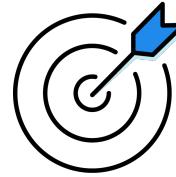
Service

97% customer satisfaction rate and resolve 85% of issues under one business day.



Security

PowerDMS is hosted on AWS GovCloud, the most secure infrastructure. They lead the industry in uptime and security.

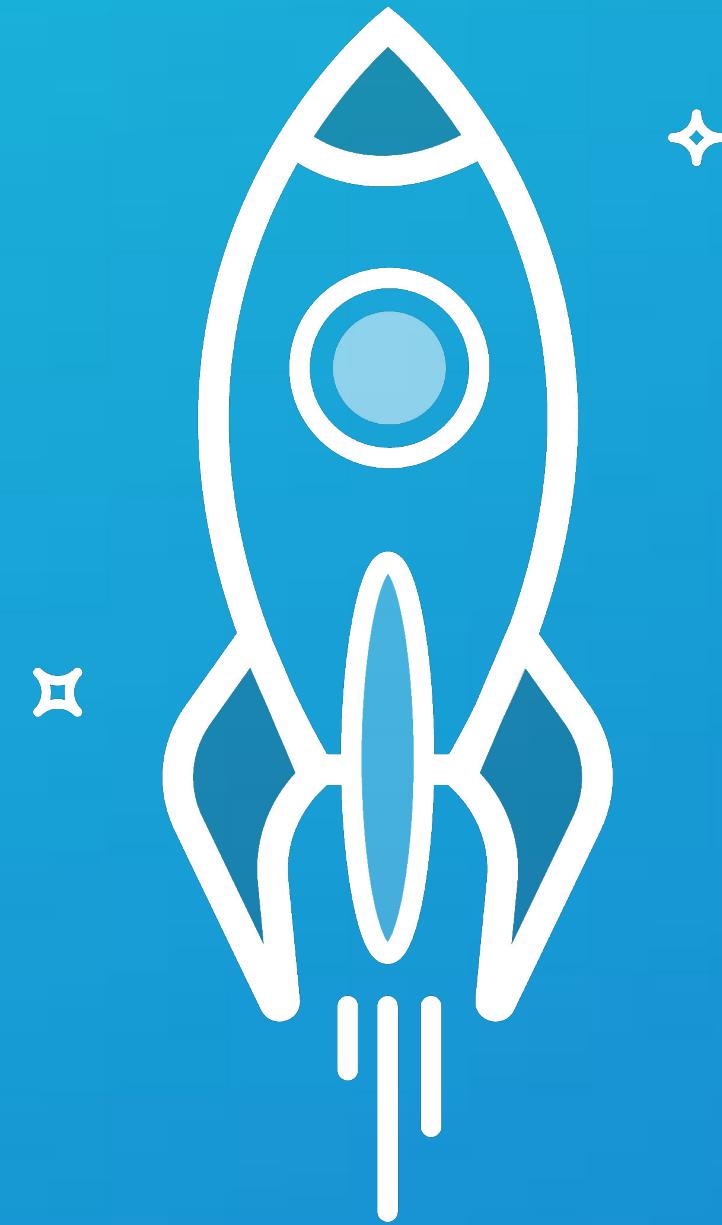


Skill

Over 20 years experience in the public sector, serving 7,000+ agencies and 500,000+ active users nationwide.

PowerDMS
by NEOGOV

Our Success Plan



Implementation Process(90 day success plan)

1.Kick-off

2.Techical Configuration

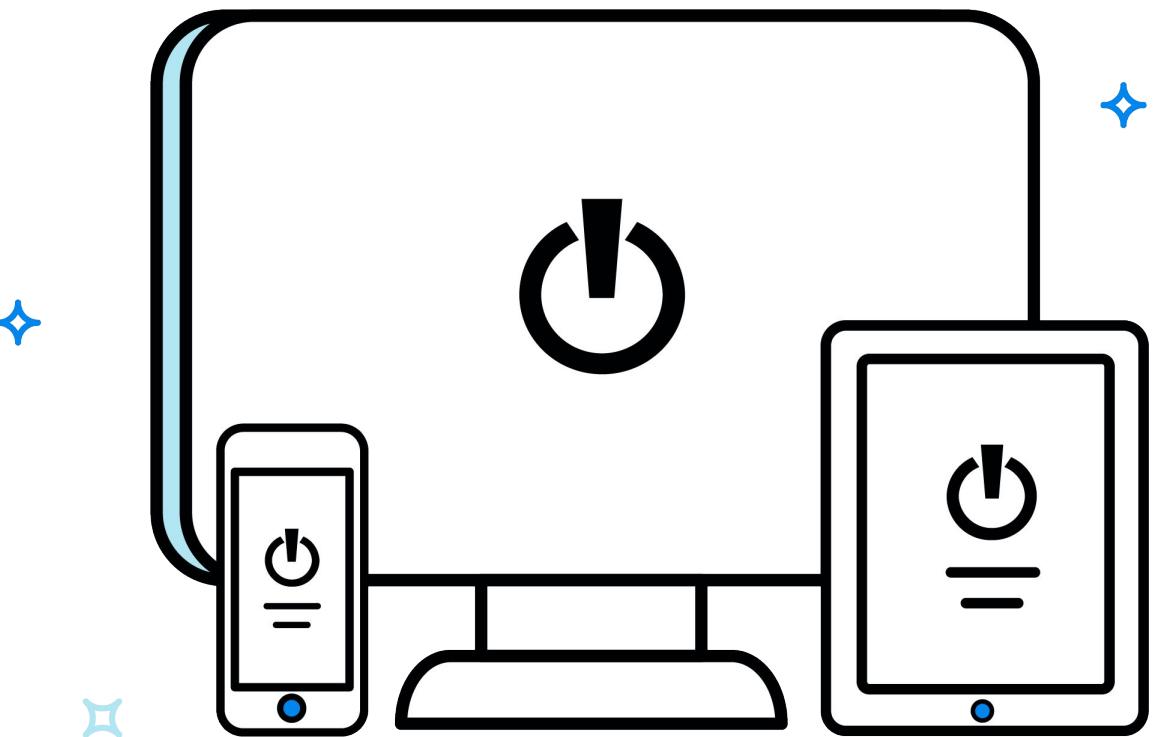
3.Initiate Use case

4.Implement Use case

5.Go live

Support from PowerDMS

- Dedicated Implementation Consultants (ICs) simplify setup and ensure project success.
- Ongoing support is available 24/7 via chat, phone, and email at no additional cost.



Q&A



thank you

