

PolicyTech Policy and Procedure Management
Localization Workflow Supplement



PolicyTech® 10.6 Localization Workflow Supplement

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Localization Workflow Overview

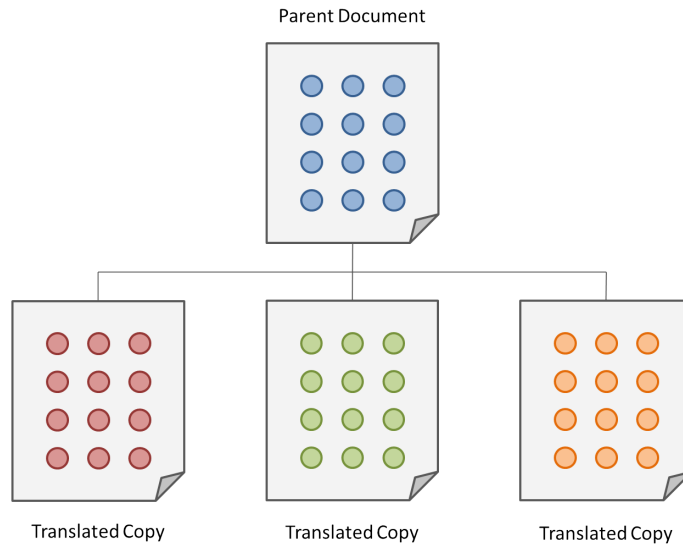
Localization Workflow is a powerful feature that enables the following functionality:

- **Create localized copies from a master document or questionnaire.**
The assigned owners of localized copies can modify their copies as necessary by translating the text, modifying the text, changing settings, and making local task assignments.
- **(Optional) Sync localized copies with the master document/questionnaire for centralized reader and questionnaire status reporting.** The status of all reading or completion task assignments—those assigned in the master document/questionnaire and those assigned in each localized copy—can be viewed in the master document/questionnaire **Overview** and in reports that include the master document/questionnaire. Localized copy owners can translate or otherwise modify questionnaire text but cannot add or delete questions. All questionnaire results can be viewed in reports that include the master document/questionnaire.
- **(Optional) Automatically assign readers to the localized copies translated into their languages.** For reading/completion assignments made in the master document/questionnaire, each user is automatically assigned to read or complete the localized copy that matches that user's preferred language.

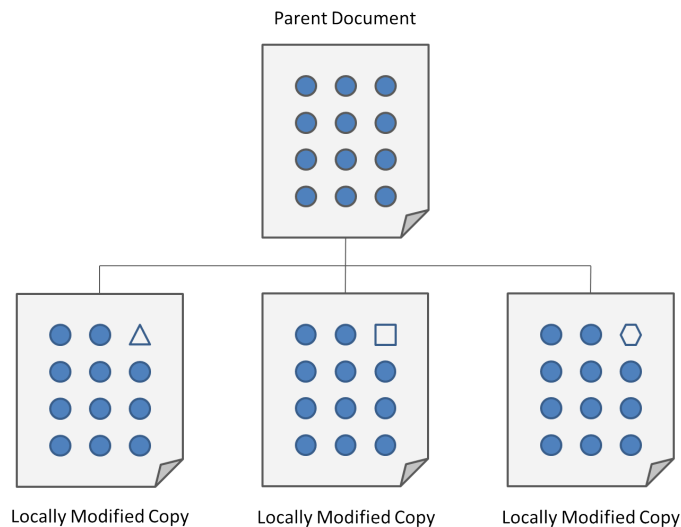
Sample Localization Scenarios

The following are some sample scenarios for when this feature can be especially useful.

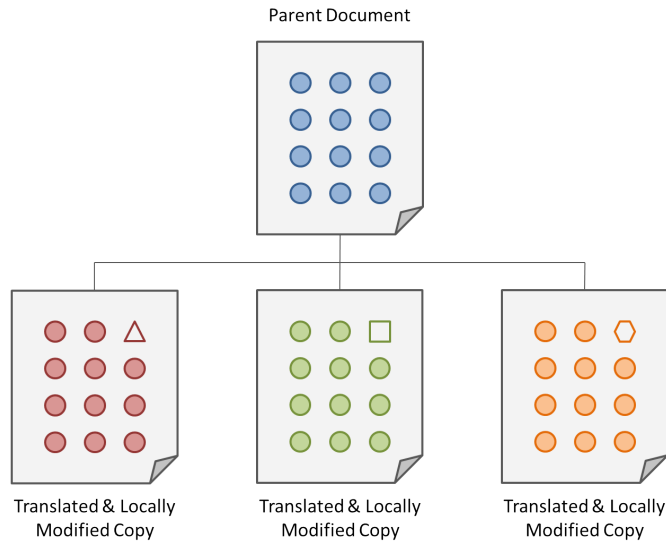
- **Master document with translated copies:** An international IT company needs translated copies of a software purchasing policy for its various offices around the world. The company also wants the main office to control the document content and needs a process for updating the translated copies whenever the original document is updated.



- **Master document with modified copies:** Corporate headquarters of a healthcare organization needs control over an admittance policy's basic content but also needs to allow some content flexibility for the local regulations of its many hospitals located throughout the western United States.



- **Master document with copies that are both translated and modified:** A worldwide insurance company with its headquarters in Atlanta has satellite offices in Hong Kong, Quebec, London, Paris, and Frankfurt. The company's human resources department needs to distribute a hiring policy document that each office will both translate and modify to reflect local labor laws.



Other Sample Scenarios

Centralized tracking of reader status: The compliance officer of a large corporation distributes copies of an evacuation procedure document to each building at the corporate headquarters campus. The document includes a questionnaire that assigned readers must successfully complete in order to mark the document as read. The compliance officer asks the owner of each site copy to replace the graphic of the main building floor plan with its building floor plan. She also needs to track who has read the evacuation procedure, including the master document and all site copies, and wants to periodically generate a questionnaire results report that includes all readers.

Automatic assignment of readers to translated copies: The director of human resources creates a harassment policy document in English and creates copies of the document that he sends out to an agency for translation into the company's five official languages. He needs to assign all users at all company sites to read the document in their preferred language (which may or may not be the same as the site's default language).

Typical Localization Workflow Process

The **Localization Workflow** process can consist of the following high-level steps:

Set Up

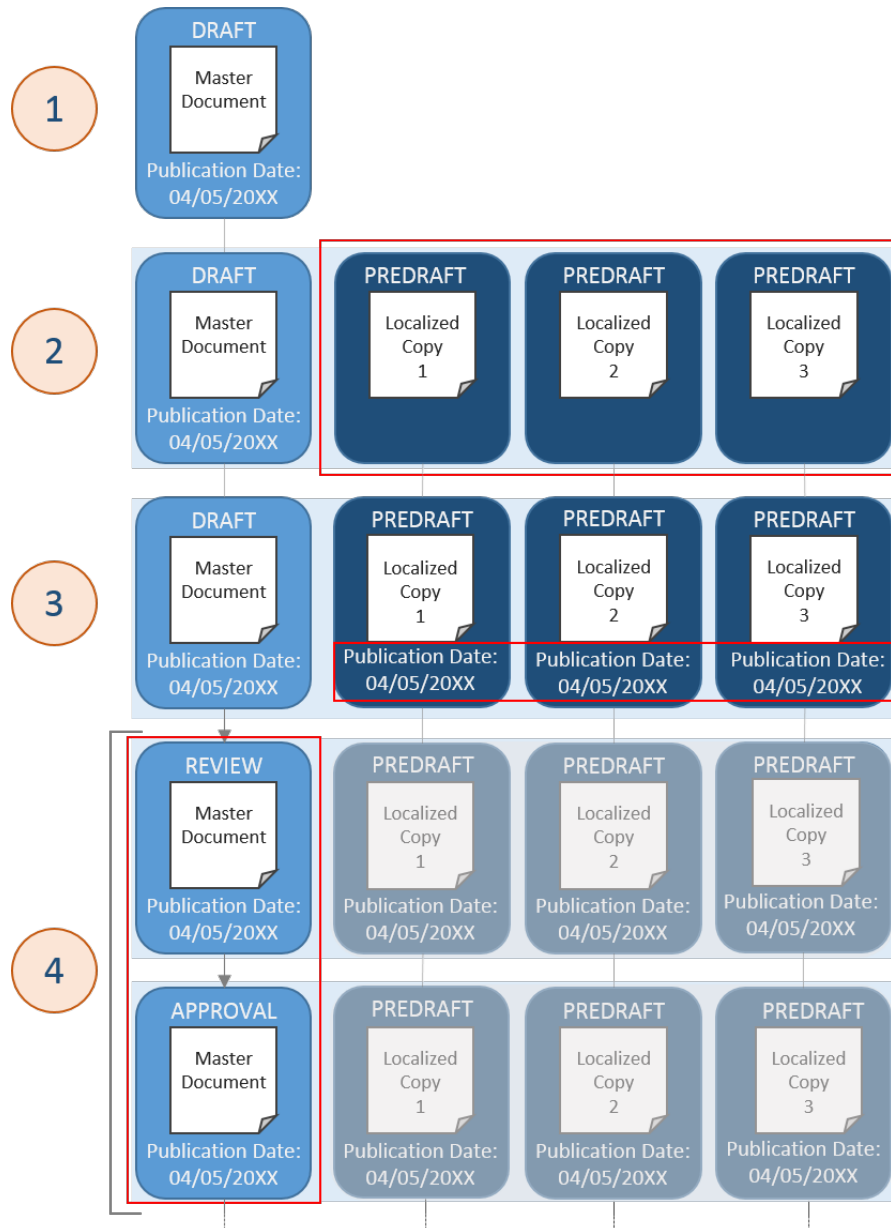
- Your organization buys the **Localization Workflow** module and an administrator enables it in PolicyTech.
- The administrator creates a template with **Localization Workflow** enabled.

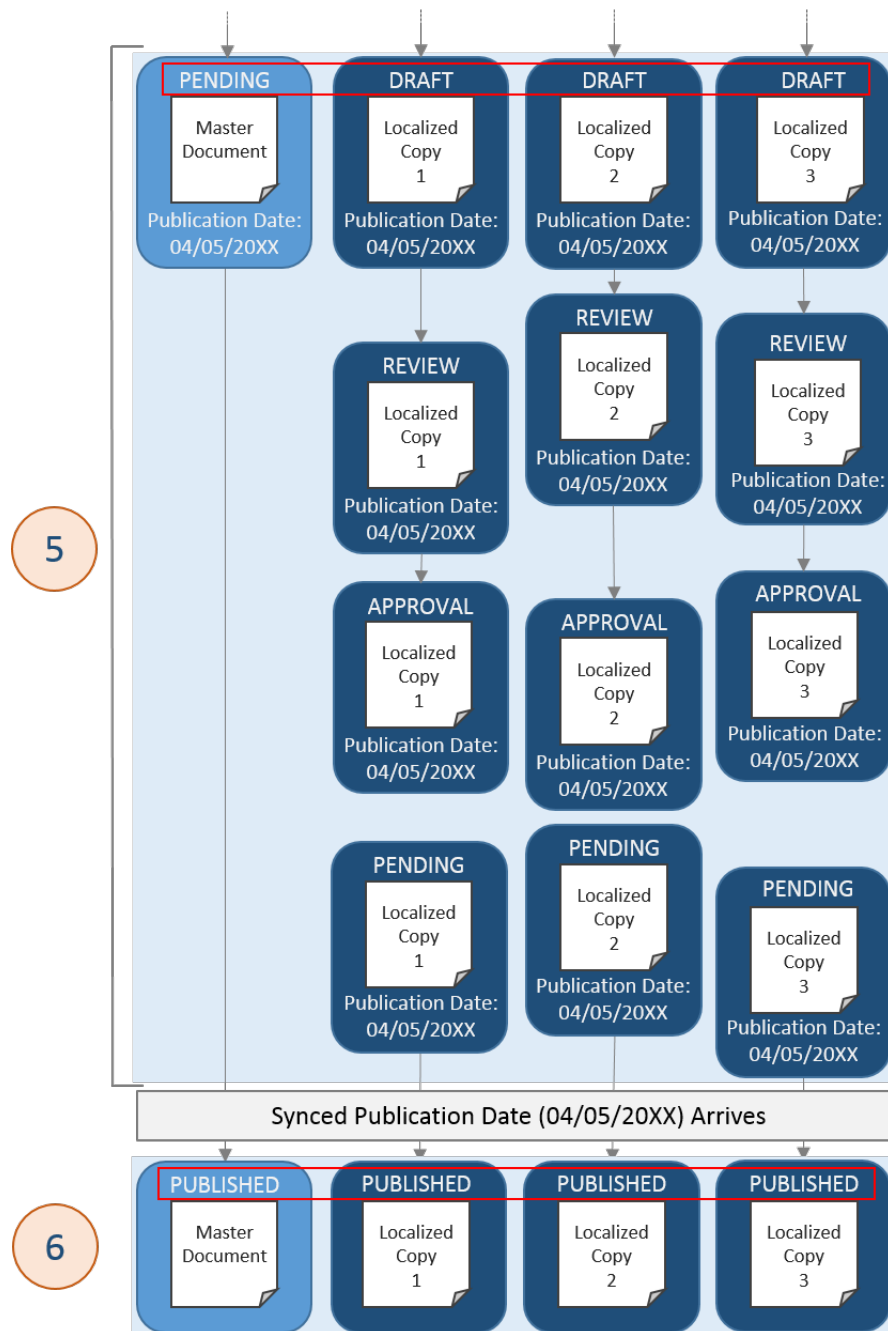
Use

1. A document owner creates a master document or questionnaire using the enabled template and sets the document's/questionnaire's publication date to some time in the future that is estimated to be after all localized copies of the master document/questionnaire will be completed.
2. In the **Properties Wizard** of the master document/questionnaire, the owner adds localized copies by providing a title and selecting a document owner, template, site, and language for each copy. These copies reside in predraft status until the master document/questionnaire is approved.
3. The master document/questionnaire owner opens each localized copy and sets the same publication date as the master document/questionnaire.
4. The document owner submits the master document/questionnaire for review and approval.
5. When the master document/questionnaire is approved and moved to pending status (because of the postdated publication), the localization copies are moved into draft status within their assigned sites and the copy document owners are notified. The assigned document owners then work on the copies by translating them or modifying them as appropriate for their local readers or questionnaire assignees.

The assigned document owners submit the copy documents/questionnaires independently for local review and approval. Assuming that each of the copy documents/questionnaires is approved before the synced publication date, each copy moves into pending status.

6. When the assigned publication date arrives, the master and all copy documents/questionnaires currently in pending status are published, and notifications are sent to all users required to read the documents or complete the questionnaires.





Setting Up Localization Workflow

Important: The **Localization Workflow** module is an optional feature and must be purchased. If you have questions about or want to purchase the **Localization Workflow** module, call Customer Support at 888-359-8123 (toll-free in the U.S. and Canada) or 208-359-8123.

After purchasing the **Localization Workflow** module, setting it up consists of activating the feature using a special registration code and then enabling the feature in templates.

Activating Localization Workflow

If you purchase the **Localization Workflow Module**, you will be given a new registration code that enables this feature module. Submit the new registration code using **Registration Info** in **System / IT Settings** (see [Registration Info](#) for help).

Enabling Localization Workflow in a Template

Once **Localization Workflow** has been enabled within PolicyTech, you must enable this feature in one or more templates before document owners can use the feature while creating or editing a document or questionnaire.

1. Click **System Settings**, click **Document Setup**, and then click **Templates**.
2. Create a new template (see "Creating a Template" in the [Administrator's Guide](#)) or click an existing one to open it.
3. With the **Properties Wizard** tab selected, click **8. Localization Workflow**.

Note: If you don't see step **8. Localization Workflow**, then the module is not currently enabled. If you have purchased the module, make sure that the new registration code has been submitted in **Registration Info** in **System / IT Settings**. If the step is still not available, then the license that includes **Localization Workflow** may have expired. Call Customer Support at 888-359-8123 (toll-free in the U.S. and Canada) or 208-359-8123 for help.

Policy v.1

Edit Document Properties Wizard Overview ?

1 Template Setup

2 Category Types

3 Writers

4 Reviewers

5 Approvers

6 Assignees

7 Security

8 Localization Workflow

Title

Policy

Workflow Configurations

Full (Default)

Content Type

Word Document

Sites

☒ Corporate Headquarters

☐ Manufacturing

☒ Sales & Support Office

4. Select **Enable Localization Workflow**, and then click **Save** or **Save and Close**.

Policy v.1

Edit Document Properties Wizard Overview ?

Save and Close

Template

1 Template Setup

2 Category Types

3 Writers

4 Reviewers

5 Approvers

6 Assignees

7 Security

8 Localization Workflow

☒ Enable Localization Workflow

Localization Workflow provides the following benefits:

- Distribution of copies of corporate documents to various locations
- Ability to modify settings, make task assignments, and write localization instructions per copy
- Automatic notification to copy owners when the master document is approved
- Separate review and approval processes for the master document and each of its copies
- Optional syncing of assignee tasks between a master document and its copies
- Optional syncing of questionnaires

Benefit examples:

After the Corporate Code of Conduct has been approved, copies created for other sites/facilities/regions can be reviewed, approved, and attested to on their own timelines. This allows other sites to edit the document to meet their regional regulatory requirements or to show site-specific logos and company names.

If your organization's employees speak multiple languages, you can approve a master document and then instruct document owners to translate their copies into site-specific languages. Then, when employees are assigned to read the master, they will be presented with the translated copy in their preferred language. Attestations and questionnaire results for translated copies are included in reports containing the master document.

Back Save Edit Document

5. Inform document owners that **Localization Workflow** has been enabled for this template and refer them to the "Working with Localization Workflow" chapter in the [User's Guide](#).

Tasks for Master Document/Questionnaire Owners

The following are the tasks that the owners of master documents or questionnaires may need to complete.

[Creating a Master Document/Questionnaire for Localization Workflow](#)

[Making Changes to a Master Document/Questionnaire](#)

[Accessing Localized Copies from within the Master Document/Questionnaire](#)

[Checking the Workflow Status of Localized Copies](#)

[Running Localization Workflow Reports](#)

[Creating a New Version of a Master Document/Questionnaire](#)

Creating a Master Document/Questionnaire for Localization Workflow

1. Ask your administrator which templates have **Localization Workflow** enabled.
2. Start a new document (see "Creating a Document (Overview)" in the [User's Guide](#) for help) or questionnaire (see "Creating a Questionnaire (Overview)" in the [User's Guide](#) for help), or open an existing one.
3. (Conditional) If you're creating a new document or questionnaire, in the **Properties Wizard** with the **Settings** step selected, type a title.
4. Do one of the following:
 - If this is a new document/questionnaire, select a template that has **Localization Workflow** enabled.
 - If this is an existing document/questionnaire and you see **Localization Workflow** below **Security**, move on to the next step.
 - If you're editing an existing document/questionnaire and its currently assigned template does not have **Localization Workflow** enabled, select an enabled template. Then, in the **Confirm** window, select at least **Properties**, and then click **Save**.
5. Modify other settings and make or change task assignments as needed (see "Assigning Properties" in the [User's Guide](#) for help).

Important: The writer, reviewer, approver, and reader assignments you make in the master document/questionnaire are not inherited by the localized copies you create. Preset assignments are only inherited from the selected template, which assignments can be changed by a localized copy owner. An

exception to this rule is when you select **Sync & Auto Assign** or **Sync & Auto Assign & Use Master's Read Interval** as the **Master/Copy Mode** setting when you create a copy. In this case, localized copies inherit any reader assignments made in the master document/questionnaire.

6. Click **Localization Workflow**.

7. (Optional) When this master document/questionnaire is approved, the localized copy owners will be notified that they have been assigned to own and work on the copy documents/questionnaires. You have the option of including instructions in these document owner notifications. You can type instructions separately when creating each copy or preset the instructional text so that it is automatically added to each copy you create. You can then modify the default text in each copy as needed.

In the **Default Document Owner Instructions** box, type the text you want automatically added to each new copy's settings.

8. Use one or both of the following methods to add localized copies:

- [Create localized copies as new documents/questionnaires](#)
 - [Assign existing documents/questionnaires as localized copies](#)
9. Do one of the following:
 - If this is a document, add its content (see "Writing a Document" in the [User's Guide](#)).
 - If this is a questionnaire, adjust questionnaire settings and add questions and answers (see "Adjusting Questionnaire Settings" and "Adding Questions and Answers to a Questionnaire" in the [User's Guide](#)).
 10. (Optional) If this is a document, add a questionnaire to it (see [Adding a Questionnaire to a Master Document](#)).
 11. (Optional) If this is a document, attach files or add reference links (see "Attaching Files and Adding Reference Links" in the [User's Guide](#)).
 12. Submit the document/questionnaire for collaboration, review, or approval (see "Submitting a Document or Questionnaire to Writers, Reviewers, or Approvers" in the [User's Guide](#)).

Create Localized Copies as New Documents

1. In the **Localization Workflow** step of the master document or questionnaire, click **Create new localized copy**.

The screenshot shows a 'Create New Localized Copy' dialog box. It contains the following fields and values:

- Title:** Travel Policy
- Document Owner:** Hansen, Tom (Accounting Manager)
- Document Template:** Localization Workflow Master
- Sites:** Choose which sites can access this document
- Instructions:** Please Translate into your site's language and change section 3 as needed.
- Language:** English (English)
- Master/Copy Mode:** Do Not Sync

Buttons at the bottom right: Close, Add.

By default, the new copy inherits the master document's/questionnaire's **Title**, **Document Owner**, and **Template** settings, any of which you can change.

Notes:

- The copy's assigned owner can change any of the **Create New Localized Copy** settings except **Master/Copy Mode**.
- A copy document/questionnaire is assigned to its owner's department by default.

2. (Optional) Change the default title inherited from the master document/questionnaire.

Note: The copy's assigned owner can also change the title, such as translating it into the local language.

3. (Optional) Unless you intend to own this copy yourself, for **Document Owner**, select the person who will be responsible to localize the copy, submit it for review and approval, and maintain it in the future.
4. (Optional) If the copy needs a different template, select one.

Important: To preserve the master document's/questionnaire's contents in the copy, only the new template's properties will be applied to the localized copy. In other words, when the copy's owner opens the copy, its contents will be the same as the master document's/questionnaire's while the settings in the **Properties Wizard** will be those from the selected template.

5. For **Sites**, select the sites that will have access to this localized copy.
6. (Optional) In the **Instructions** box, type or edit the text you want included in the email sent to notify the document owner to work on this copy.
7. (Optional) In the **Language** list, click the language for this localized copy.

Important:

- The **Language** setting is especially important if you plan to select **Sync & Auto Assign** or **Sync & Auto Assign & Use Master's Read Interval** as the **Master/Copy Mode** for a localized copy in the next step. With one of these settings selected, reader assignments are made according to users' preferred languages.
 - You will only see the languages that have been enabled in PolicyTech.
8. The **Master/Copy Mode** setting determines to what extent **Properties Wizard** settings and assignments, and questionnaires in localized copies are controlled by the master document/questionnaire. Select a **Master/Copy Mode** option. See [About Sync Modes](#) for detailed descriptions.
 9. Click **Add**. The **Create new localized copy** window stays open and a message stating that the copy has been added is briefly displayed.

10. Do one of the following:

- To add another copy, modify the title, instructions, and settings as necessary, and then click **Add Another**.

Note: Clicking **Add Another** immediately adds a copy using the current settings. So, if you don't make changes to the settings, clicking **Add Another** adds another copy with the same settings as the previously added copy.

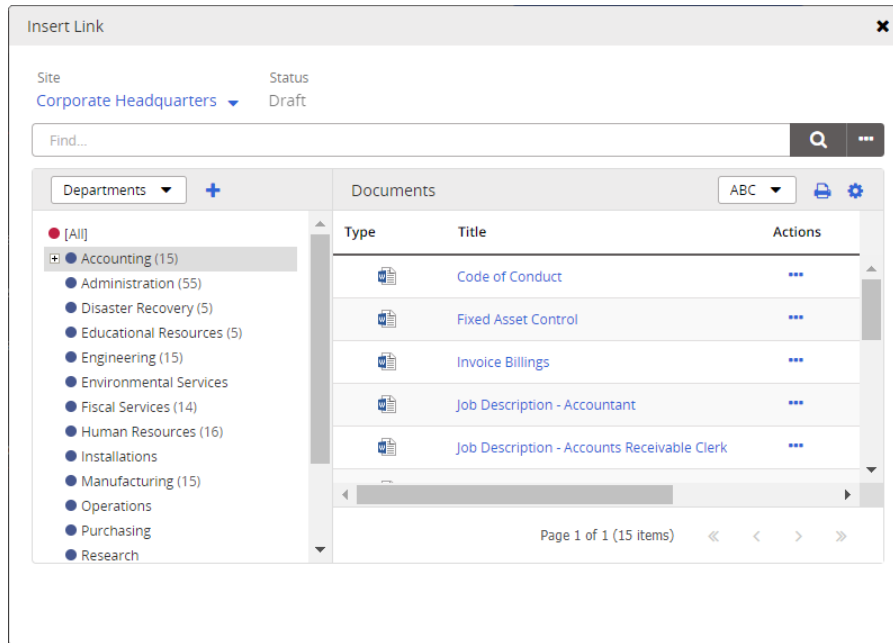
- To stop adding copies, click **Close**.

11. (Optional, but recommended) Follow the instructions in [Sync Master and Copy Publication Dates](#).

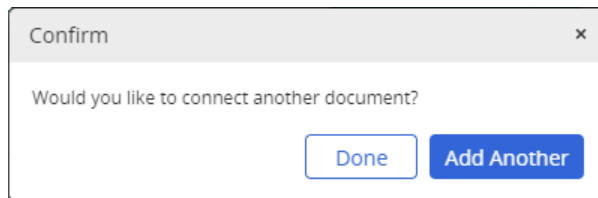
Assign Existing Documents as Localized Copies

You can connect any existing draft document as a localized copy of a master document or any existing draft questionnaire as a localized copy of a master questionnaire.

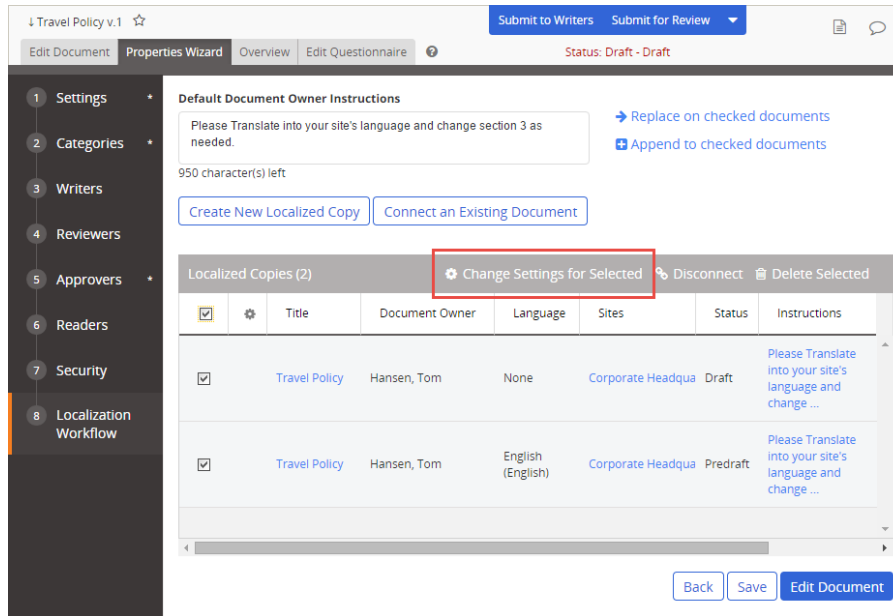
1. In the **Localization Workflow** step of the master document's or master questionnaire's **Properties Wizard**, click **Connect an Existing Document**.
2. Use any available tools to display a list of documents/questionnaires that includes the one you want to connect, and then click it.



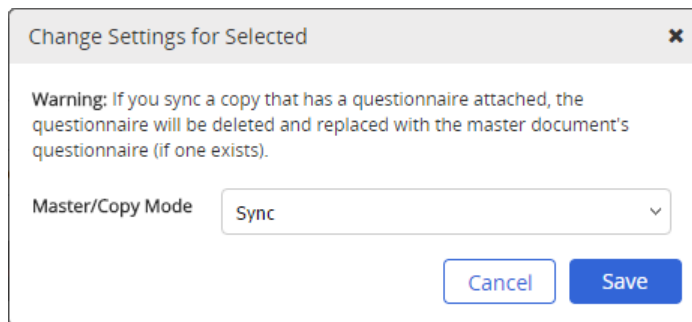
A confirmation window is displayed.



3. Do one of the following:
 - To connect another draft document/questionnaire, click **Add Another**, and then repeat step 2 above.
 - Click **Done**.
4. To configure the **Master/Copy Mode** setting for the newly connected documents/questionnaires, in the **Localized Copies** list, select one or more documents/questionnaires, and then click **Change Settings for Selected**.



5. The **Master/Copy Mode** setting determines to what extent **Properties Wizard** settings and assignments, and questionnaires in localized copies are controlled by the master document/questionnaire. For **Master/Copy Mode**, click an option (see [About Sync Modes](#) for detailed descriptions), and then click **Save**.




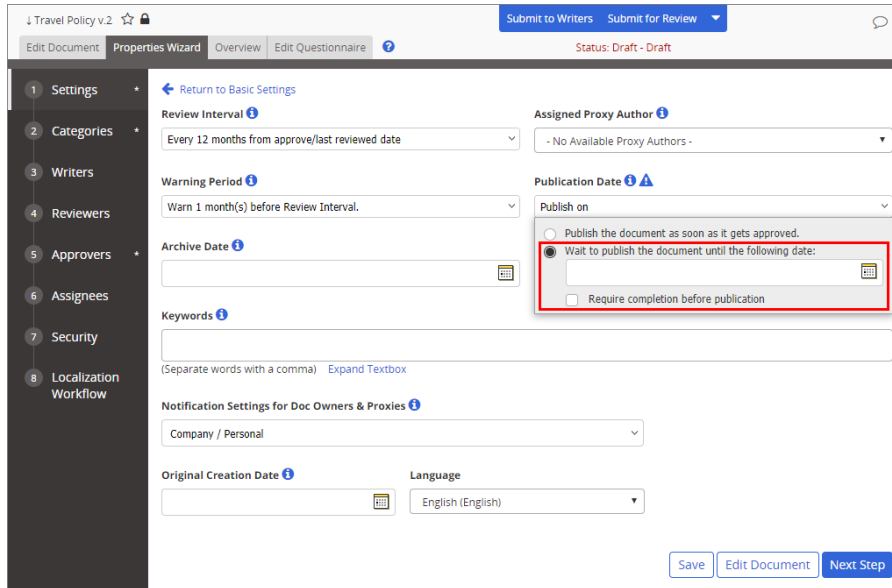
6. (Optional, but recommended) Follow the instructions in [Sync Master and Copy Publication Dates](#).

Syncing Master and Copy Publication Dates

If you want the master document or questionnaire and all of its copies to be published to readers at the same time, you'll need to set the same publication date for each document/questionnaire.

1. If it's not already open, open the master document or questionnaire.
2. Click **Properties Wizard**, and then, in the **Settings** step, click **Optional Settings**.

- For **Publication Date**, click **Wait to publish the document until the following date**. Click , and then click a date that you estimate will be after all localized copies will be completed.



- Click **Localization Workflow**, and then, in the **Localized Copies** list, click a document/questionnaire to open it.
- Repeat steps 2 and 3 above for the current localized copy, and then save and close it.
- Repeat steps 4 and 5 as necessary to sync the publication date for the remaining localized copies.

About Localization Instructions

When adding localized copies in the master document or questionnaire, the master document owner has the option of including instructions for the document owners who will receive task assignments to own and localize the copies. The instructions can be general in nature and be automatically added to each localized copy as it is added, or they can be specific to a localized copy. Instructions can also be changed or added to at any time up until the localized copy is approved and moved to pending or published status.

A master document/questionnaire owner can write instructions when first adding a localized copy or when editing an existing one. For details, see [Creating a Master Document/Questionnaire for Localization Workflow](#) or [Accessing Localized Copies from within the Master Document/Questionnaire](#).

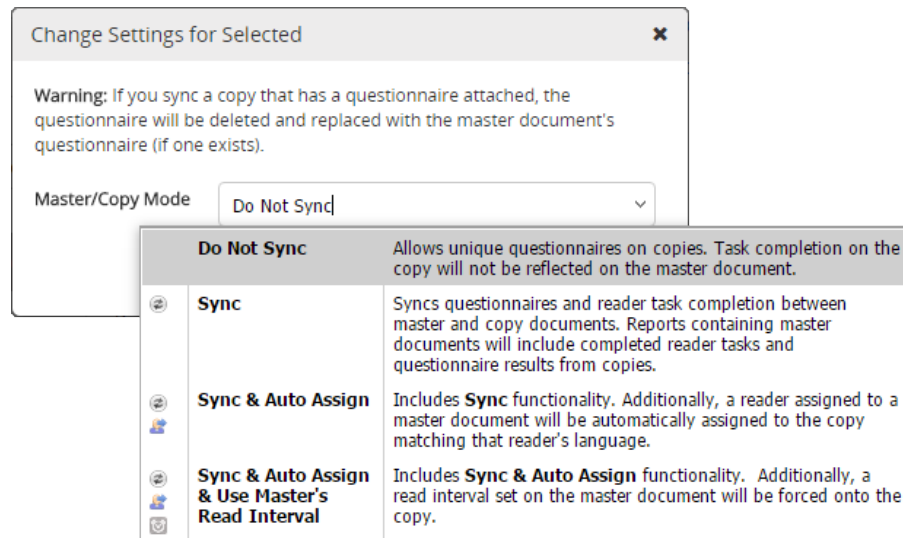
If instructions exist for a localized copy at the time the master document/questionnaire is approved and the copy is moved from predraft to draft status, those instructions are included in the task notification email the localized copy owner receives. The instructions are also always available from

within the **Properties Wizard**, in the **Settings** step, in the **Basic Settings** area (see [Viewing Localization Instructions](#)).

Note: Changes made to localization instructions after a copy has been moved to draft do not generate a new notification email, but the modified instructions can be seen in the **Properties Wizard**.

About Sync Modes

In **Localization Workflow**, sync modes define the relationship between a master document or questionnaire and its copies.



Do Not Sync

With **Do Not Sync** selected, there is no centralized reader status reporting available from the master document or questionnaire. This means that reader status for a localized copy can only be viewed in that localized copy's **Overview** and in management reports that include that localized copy.

In addition, document owners of localized copies are able to freely add and edit questionnaires in their copies. If the master is a document that includes a questionnaire, or if the master is a stand-alone questionnaire, the master's questionnaire content will also be included in each localized copy. However, localized copy owners can freely edit, add, and delete questions from the questionnaire.

Sync

With **Sync** selected, the status information for reader tasks, including questionnaire results, will be centralized in the master document or questionnaire, in addition to being available from within the localized copies. Reader status for all of the master document's/questionnaire's localized copies can be viewed in the master document's/questionnaire's **Overview** tab and in management reports that include the master document/questionnaire.

Important: In a report that includes only the master document/questionnaire and none of the copies, only completed reader tasks for synced copies appear in that report. In other words, incomplete reader tasks from synced copies are not rolled up to the master document/questionnaire. See [Running Localization Workflow Reports](#).

This mode also limits localized copy owners to editing or translating questions and answers in a questionnaire—whether it is in a document or a questionnaire—inherited from the master document/questionnaire. They will not be permitted to add or delete questions or change most questionnaire settings.

Sync & Auto Assign

This mode includes the same functionality as the **Sync** mode. It also checks the **Language** selection for each assigned reader and automatically assigns each reader the localized copy with that language selected. If there is no localized copy for a reader's selected language, that reader is assigned the master document/questionnaire. With this mode selected, all copies inherit the master document's/questionnaire's reader assignments but also allow copy-specific reader assignments.

Important:

With the **Sync & Auto Assign** mode selected, we highly recommend syncing the publication dates of the master document/questionnaire and its localized copies so that all localized copies are available at the time the document/questionnaire is assigned to readers (when the master document/questionnaire is published). You can do this by setting the same future publication date for the master document/questionnaire and each of its localized copies (see [Sync Master and Copy Publication Dates](#)).

If a localized copy does not exist in a reader's language at the time the master document/questionnaire is published but later becomes available, the reader receives two reading task notifications—one when the master document/questionnaire is published and another when the localized copy is published. If the reader has already completed the task to read the master document or complete the master questionnaire, that reader will not be required to read/complete the localized copy. If the reader has not marked the master document as read or completed the master questionnaire before the localized copy is published, the reader will only be required to read/complete the localized copy. The original task to read/complete the master document/questionnaire will be hidden in **My Tasks** and marking the localized copy as read or completing the localized copy also completes the reading/completion task for the master document/questionnaire.

Sync & Auto Assign & Use Master's Read Interval

In addition to the functionality of the **Sync & Auto Assign** mode, this mode forces all copies to use the master document's/questionnaire's read interval if it

is set.

Adding a Questionnaire to a Master Document

You can add a questionnaire to a master document just as you would with any other document. See "Creating a Document Questionnaire" for detailed instructions.

Note: The following "Syncing Copy Questionnaires with the Master Questionnaire" and "Facilitating the Localization of Synced Questionnaires" sections that follow also apply to a stand-alone questionnaire master.

Syncing Copy Questionnaires with the Master Questionnaire

You have the option of locking the structure and most settings of the questionnaire in a copy by syncing it with the master document's questionnaire or with the master stand-alone questionnaire. Then, localized copy owners will be able to localize the text for section headings, questions, answers, and the questionnaire introduction, but will not be able to add or delete questions or change most questionnaire settings.

To learn about sync options, see [About Sync Modes](#).

For instructions on selecting a sync mode while adding or editing a localized copy, see [Creating a Master Document/Questionnaire for Localization Workflow](#), step 14, or [Accessing Localized Copies from within the Master Document/Questionnaire](#).

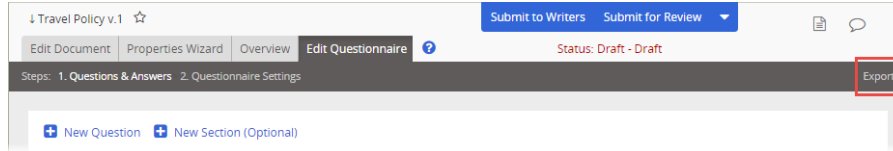
Facilitating the Localization of Synced Questionnaires

After creating a questionnaire in a master document that is synced with its localized copies, or creating a stand-alone questionnaire as a master, you can export that questionnaire, which automatically creates a Microsoft® Excel® spreadsheet for each of the currently synced localized copies assigned a different language than the master. Each spreadsheet contains the master questionnaire's introduction, section headings, questions, and answers. You can then send the questionnaire export files to the localized copy owners, who can handle their translation or modification.

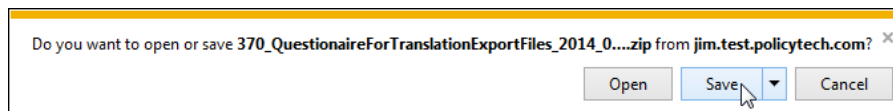
Notes:

- The **Export** option is only available if at least one of the localized copies is assigned a different language than the master.
- While you can export a questionnaire from a master, you cannot import one into a master. Importing is only available for localized copies.
- You can export a questionnaire while a master is in any status except archived.
- You can export a questionnaire from a master regardless of the Master/Copy Mode settings of its localized copies.

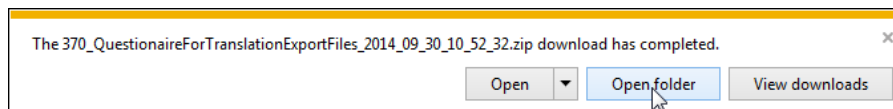
1. Open a master document that has a questionnaire or a master stand-alone questionnaire, and then click the **Edit Questionnaire** or **View Questionnaire** tab.
2. Near the upper right corner of the window, click **Export**.



3. A prompt appears giving you the option of opening or saving the exported file. Click **Save**.



4. At the next prompt, click **Open Folder**.



You should see a compressed file folder with a name in the following format:

[document ID]_QuestionnaireForTranslationExportFiles_[year, month, hour, minute, second].zip

For example:

370_QuestionnaireForTranslationExportFiles_2014_09_30_10_06_40.zip

5. Extract the folder's contents to a location of your choice. You should now see one or more Excel (.xls) files named with the following format:

[document ID]_[language code]_QuestionnaireForTranslationExportFiles_[year, month, hour, minute, second].xls

For example:

371_fr-FR_QuestionnaireExportForTranslationFile_2014_09_30_10_06_40.xls

Important: The number of exported Excel files may or may not be the same as the number of localized copies. An export file is created only if a copy's selected language is different than the master's and is not **None**.

6. Either copy the extracted Excel files to a network drive where copy owners can access them or email the files to them.
7. Refer copy owners to the [Prepare and Import a Questionnaire Translation File](#) section in this guide .

Making Changes to a Master Document/Questionnaire

While a master document or questionnaire is in Draft or Collaboration status, as the document owner you can edit the master document/questionnaire as you would any other document/questionnaire. See "Editing a Draft Document or Questionnaire" in the [User's Guide](#) for detailed instructions on editing document content, questionnaire content and settings, and the standard **Properties Wizard** steps. For instructions on editing the **Localization Workflow** step, see [Accessing Localized Copies from within the Master Document/Questionnaire](#).

Once a master document/questionnaire is approved and moved to Pending or Published status, you are limited to editing **Properties Wizard** settings. If you add, change, or delete a localized copy in an approved document/questionnaire, the affected copies' assigned document owners are immediately notified. Also, if you add a localization copy, that copy is immediately created and placed in Draft status, because the master document/questionnaire has already been approved.

Accessing Localized Copies from within the Master Document/Questionnaire

You can use the **Localization Workflow** step in the master document's or master questionnaire's **Properties Wizard** to access localized copies while the localized copies are in any workflow status (Predraft, Draft, Collaboration, Review, Approval, Pending, Published, or Archived). You cannot, however, delete a localized copy from within the master document/questionnaire after the localized copy has been approved and moved to Pending, Published, or Archived status.

Important: As the master document/questionnaire owner, you will continue to have access to all localized copies even if the owner of a localized copy selects a security level that would normally exclude you. Also, while you can only assign a localized copy to sites you have access to, a localized copy owner may have access to additional sites and could assign the localized copy to a site you don't have access to. In this case, you will still have access to the document/questionnaire but only by directly accessing it. You can click the document/questionnaire link in the **Localization Workflow** step or enter the document/questionnaire URL in your browser (see "Viewing a Document's or Questionnaire's URL" in the [User's Guide](#)).

1. Open the master document or questionnaire, click the **Properties Wizard** tab, and then click **Localization Workflow**.

Note: In a document/questionnaire list, a master's title is preceded by a down arrow (↓).

2. Make needed changes, and then click **Save**. See the sections that follow for detailed instructions.

Adding or Deleting, or Disconnecting a Localized Copy

Add a copy. Click **Create New Localized Copy**, and then follow the instructions in [Creating a Master Document/Questionnaire for Localization Workflow](#) starting with [step 8](#).

Delete a copy. Select one or more copies, click **Delete Selected**, and then click **Yes**.

Important: You can only delete a localized copy from within the **Localization Workflow** step while the copy is in Predraft status and if the master document/questionnaire is not in Archived status.

Default Document Owner Instructions

Please Translate into your site's language and change section 3 as needed.

950 character(s) left

[→ Replace on checked documents](#)
[+ Append to checked documents](#)

[Create New Localized Copy](#) [Connect an Existing Document](#)

Localized Copies (2)							
⚙ Change Settings for Selected ⚙ Disconnect 🗑 Delete Selected							
<input type="checkbox"/>	⚙	Title	Document Owner	Language	Sites	Status	Instructions
<input checked="" type="checkbox"/>	⚙	Travel Policy	Hansen, Tom	None	Corporate Headqua	Draft	Please Translate into your site's language and change ...
<input type="checkbox"/>	⚙	Travel Policy	Howard, Susan	English (English)	Corporate Headqua	Predraft	Please Translate into your site's language and change ...
							Please Translate

[Back](#) [Save](#) [Edit Document](#)

Disconnect a copy. Before disconnecting a localized copy consider the following:

- You can disconnect both newly created copies and copies connected as existing draft documents/questionnaires.
- You can disconnect copies while they are in the Predraft, Draft, Collaboration, Review, or Approval status. Approved copies (in Pending or Published) cannot be disconnected.
- You can disconnect unapproved copies while the master document/questionnaire is in any status, including Archived.
- If a copy's **Master/Copy Mode** setting is **Sync & Auto Assign** or **Sync & Auto Assign & User Master's Read Interval**, all auto-assigned reader tasks are removed from a disconnected copy and are no longer trackable from the master copy. Reading assignments made directly within the copy are retained.
- If the copy is in Predraft status, it is permanently deleted (NOT moved to the Archive) as soon as it is disconnected.

If you still want to proceed, select one or more copies, click **Disconnect**, and then click **Yes**.

Default Document Owner Instructions

Please Translate into your site's language and change section 3 as needed.

950 character(s) left

[Create New Localized Copy](#) [Connect an Existing Document](#)

[→ Replace on checked documents](#)
[+ Append to checked documents](#)

Localized Copies (2)		Change Settings for Selected		Disconnect		Delete Selected	
<input type="checkbox"/>		Title	Document Owner	Language	Sites	Status	Instructions
<input checked="" type="checkbox"/>		Travel Policy	Hansen, Tom	None	Corporate Headqua	Draft	Please Translate into your site's language and change ...
<input type="checkbox"/>		Travel Policy	Howard, Susan	English (English)	Corporate Headqua	Predraft	Please Translate into your site's language and change ...
							Please Translate

[Back](#) [Save](#) [Edit Document](#)

Changing Sync Settings

You can quickly see the current Master/Copy (sync) Mode settings for localized copies by the icons displayed in the settings column (with in its header).

Settings Column Display	Master/Copy Mode Setting
no icons	Do Not Sync
	Sync
	Sync & Auto Assign
	Sync & Auto Assign & User Master's Read Interval

1. To change a **Master/Copy Mode** setting, select one or more copies, and then click **Change Settings for Selected**.

Default Document Owner Instructions

Please Translate into your site's language and change section 3 as needed.

950 character(s) left

[Replace on checked documents](#)
[Append to checked documents](#)

[Create New Localized Copy](#) [Connect an Existing Document](#)

Localized Copies (2)		Change Settings for Selected		Disconnect	Delete Selected		
<input type="checkbox"/>		Title	Document Owner	Language	Sites	Status	Instructions
<input checked="" type="checkbox"/>		Travel Policy	Hansen, Tom	None	Corporate Headqua	Draft	Please Translate into your site's language and change ...
<input type="checkbox"/>		Travel Policy	Howard, Susan	English (English)	Corporate Headqua	Predraft	Please Translate into your site's language and change ...

[Back](#) [Save](#) [Edit Document](#)

2. In the **Master/Copy Mode** list, click an option, and then click **Save**. (For a description of the modes, see [About Sync Modes](#).)

Change Settings for Selected

Warning: If you sync a copy that has a questionnaire attached, the questionnaire will be deleted and replaced with the master document's questionnaire (if one exists).

Master/Copy Mode Do Not Sync

	Do Not Sync	Allows unique questionnaires on copies. Task completion on the copy will not be reflected on the master document.
	Sync	Syncs questionnaires and reader task completion between master and copy documents. Reports containing master documents will include completed reader tasks and questionnaire results from copies.
	Sync & Auto Assign	Includes Sync functionality. Additionally, a reader assigned to a master document will be automatically assigned to the copy matching that reader's language.
	Sync & Auto Assign & Use Master's Read Interval	Includes Sync & Auto Assign functionality. Additionally, a read interval set on the master document will be forced onto the copy.

Changing Localization Instructions

To change existing localization instructions for a single copy,

1. In that copy's **Instructions** column, click the text to open the text editor.

Default Document Owner Instructions

Please Translate into your site's language and change section 3 as needed.

950 character(s) left

[Create New Localized Copy](#) [Connect an Existing Document](#)

[→ Replace on checked documents](#)
[+ Append to checked documents](#)

Localized Copies (2)							Change Settings for Selected	Disconnect	Delete Selected
		Document Owner	Language	Sites	Status	Instructions	Properties		
<input type="checkbox"/>		Hansen, Tom	None	Corporate Headqua	Draft	Please Translate into your site's language and change ...	-- Blank Wo		
<input type="checkbox"/>		Howard, Susan	English (English)	Corporate Headqua	Predraft	Please Translate into your site's language and change ...	Localization		

[Please Translate](#)

[Back](#) [Save](#) [Edit Document](#)

2. Make your changes, and then click **Save**.

To change instructions in multiple copies at once, type the new text in the **Default Instructions** box, and then do one of the following:

- If you only want the modified instructions to be included in any copies you add from this point forward, no further action is needed.
- Select one or more copies, and then click **Replace on checked documents**.
- Select one or more copies, and then click **Append to checked documents**. The text currently in the **Default Instructions** box is added on a new line after any existing instructions.

Default Document Owner Instructions

Please Translate into your site's language and change section 3 as needed.

950 character(s) left

[→ Replace on checked documents](#)
[+ Append to checked documents](#)

[Create New Localized Copy](#) [Connect an Existing Document](#)

Localized Copies (2) ⚙️ Change Settings for Selected 🔌 Disconnect 🗑️ Delete Selected							
<input checked="" type="checkbox"/>		Document Owner	Language	Sites	Status	Instructions	Properties
<input checked="" type="checkbox"/>		Hansen, Tom	None	Corporate Headqua	Draft	Please Translate into your site's language and change ...	-- Blank Wo
<input checked="" type="checkbox"/>		Howard, Susan	English (English)	Corporate Headqua	Predraft	Please Translate into your site's language and change ...	Localization

[Please Translate](#)

[Back](#) [Save](#) [Edit Document](#)

Editing the Properties of a Localized Copy in Predraft Status

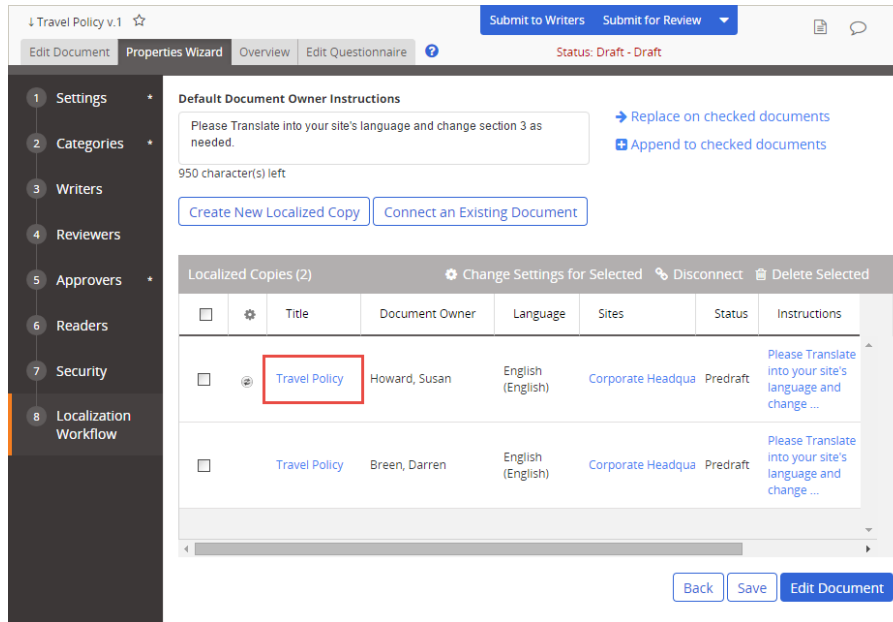
The owner of a master document or questionnaire can access and change the **Properties Wizard** settings and task assignments for any localized copy while it is in Predraft status (before the master document/questionnaire is approved). Those settings carry over when the localized copy is automatically moved to Draft status. However, the localized copy owners can change any preset properties.

Note: You cannot edit a localized copy's content in Predraft status.

1. Open the master document or questionnaire.

Note: In a document/questionnaire list, a master's title is preceded by a down arrow (↓).

2. Click the **Properties Wizard** tab, and then click **Localization Workflow**.
3. In the **Localized Copies** table, click a title.



4. Make changes in any **Properties Wizard** step.

5. Click **Options**, and then click **Save and Close**.

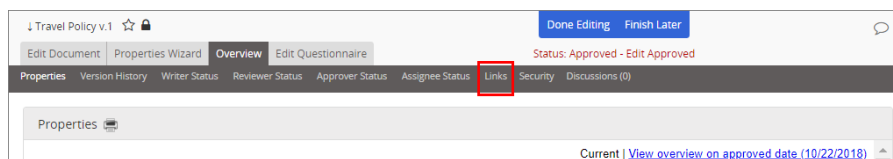
Checking the Workflow Status of Localized Copies

From the master document's or master questionnaire's **Overview**, you can see each localized copy's current status.

1. Open the master document/questionnaire.

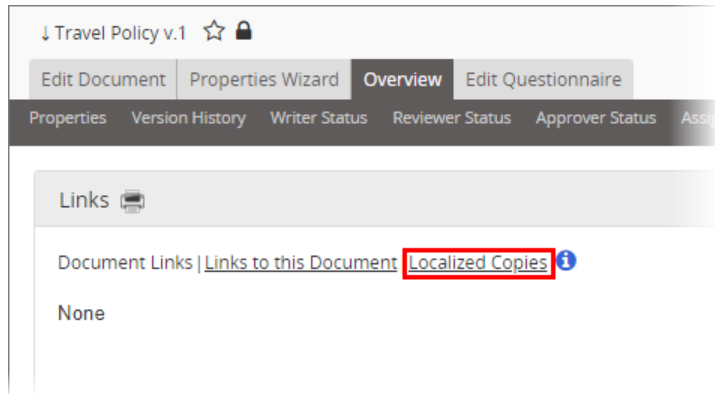
Note: In a document/questionnaire list, a master's title is preceded by a down arrow (↓).

2. Click the **Overview** tab, and then click **Links**.



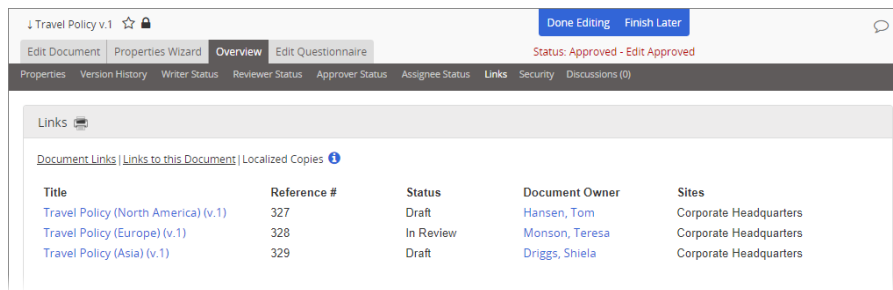
3. Do one of the following:

- If this master is a document, click **Localized Copies** to show a list of localized copies.



- If this master is a questionnaire, its localized copies are immediately listed.

2. Check the **Status** column to see where a copy is in the workflow.



Running Localization Workflow Reports

You can run the following types of Localization Workflow reports :

[Synced mode reports](#)

[Linked localized copies report](#)

Synced Mode Reports

When assigned to a copy document or questionnaire, the following Master/Copy Mode settings cause some reader task and questionnaire information to be included in certain reports when a master or localized copy document/questionnaire is included.

- Sync
- Sync & Auto Assign
- Sync & Auto Assign & Use Master's Read Interval

Note: For a more detailed description of each master/copy mode, see [About Sync Modes](#).

You can generate reports to do the following:

[View synced reading/completion task status](#)

[View synced questionnaire results](#)

Viewing Synced Reading/Completion Task Status

When one of the above sync modes is enabled, the only task status information that is rolled up to the master document or questionnaire is for completed reading/completion tasks. No other task status is communicated. For this reason, rolled up task status is limited to the following reports:

- Tasks by Document - Current
- Tasks by Document - All Tasks
- Tasks by User - Current
- Tasks by User - All Tasks
- My Tasks

Note: You can also see rolled up tasks status in the following superseded legacy reports:

- Tasks by Document: In Published
- Tasks by Document: All Workflow Statuses
- Tasks by User: Reader Tasks
- Tasks by User: All Workflow Tasks

Because these reports will be removed in a future release, we recommend using the next-generation reports instead. The instructions that follow are for the next-generation reports.

1. To include rolled up reading/completion task information, click **Reports**, and then do one of the following:
 - Click **Tasks by Document**, and then click **Tasks by Document - Current** or **Tasks by Document - All Tasks**. Select at least one master document or questionnaire with synced localized copies, plus any other documents/questionnaires you want to include, and then click **OK**.

Notes:

- For detailed instructions, see "Selecting Documents" in the [Reports Supplement](#).
- The title of a master is preceded by a down arrow character (↓).
- Because only reading/completion task status is rolled up in a report, select a master document/questionnaire in the Published or Archived status. Also, at least one of the localized copies must have been approved so that its reading/completion tasks have been assigned.

- Click **Tasks by User**, and then click **Tasks by User - Current** or **Tasks by User - All Tasks**. Select at least one user assigned to read or complete a synced localized copy in the Published status, plus any other users you want to include, and then click **OK**.

Note: For detailed instructions, see "Selecting Users" in the [Reports Supplement](#).

- Click **My Tasks & Questionnaires**, and then click **My Tasks**.
3. Under **Task Options**, select only **Complete** and **Show localized tasks on master**.

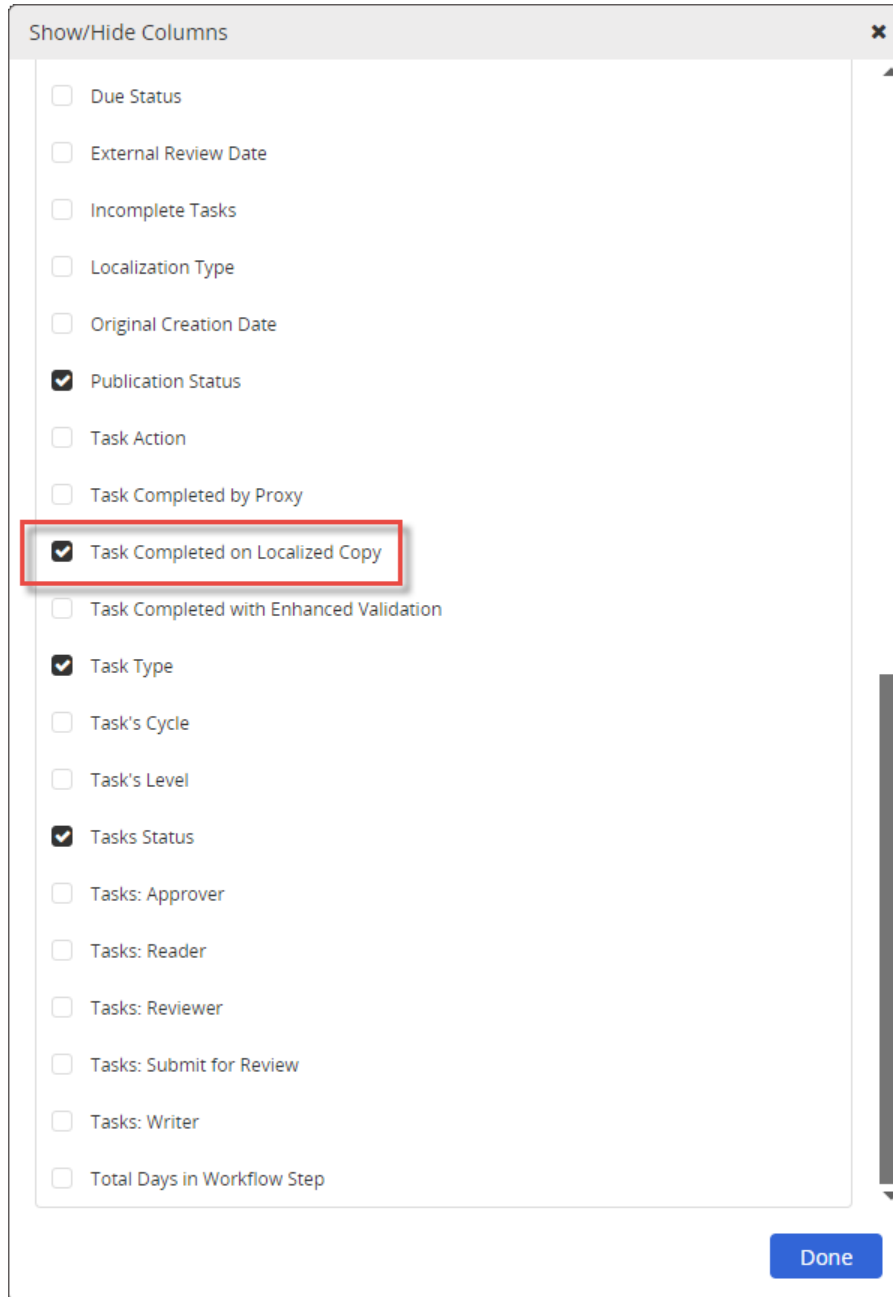
Note: Only completed reading/completion tasks from localized copies are shown for the master document/questionnaire. To avoid possible confusion, we recommend clicking to clear the **Incomplete** option (selected by default). If **Incomplete** is selected, you'll only see incomplete tasks from the master, while you'll see complete tasks both from the master and from all of its localized copies.

The screenshot shows a sidebar menu with the following items: Documents (with a count of 6), Users, Task Options, and a list of task status filters: Incomplete, Complete (checked), Skipped, and Upcoming. Below the filters is a date selection dropdown labeled 'Choose a date'. At the bottom of the sidebar are two checkboxes: 'Documents with no tasks' (unchecked) and 'Show localized tasks on master' (checked). At the very bottom are two buttons: 'View Report' and a save icon.

4. Click **View Report**.
5. Select a layout (**Task Type**, **Task Status**, or **Publication Status**).

Note: For detailed instructions, see "Working with Report Layouts" in the [Reports Supplement](#).

6. In the **Data** section heading, click , click **Show/Hide Columns**, select **Task Completed on Localized Copy**, and then click **Done**.



Show/Hide Columns

- ☐ Due Status
- ☐ External Review Date
- ☐ Incomplete Tasks
- ☐ Localization Type
- ☐ Original Creation Date
- ☒ Publication Status
- ☐ Task Action
- ☐ Task Completed by Proxy
- ☒ Task Completed on Localized Copy
- ☐ Task Completed with Enhanced Validation
- ☒ Task Type
- ☐ Task's Cycle
- ☐ Task's Level
- ☒ Tasks Status
- ☐ Tasks: Approver
- ☐ Tasks: Reader
- ☐ Tasks: Reviewer
- ☐ Tasks: Submit for Review
- ☐ Tasks: Writer
- ☐ Total Days in Workflow Step

Done

7. Depending on the report and the currently selected layout, do one of the following to view reading/completion task status:

Note: The steps that follow assume that the default column groupings and arrangements for the specified layouts have not been changed.

- A supported report with the **Task Type** layout selected: In the **Data** section, click the **Read** header to show to see individual reading/completion tasks. Look at the **Tasks Completed on Localized Copy** column to see which complete tasks were rolled up from localized copies.

Data			
Task Type ▲ ✕		Find... 🔍	
Tasks Status	User	Title	Task Completed on Localized Copy
Task Type: Read/Complete (5) 5		1	
Complete	Johnson, Douglas (Chief Executive Officer)	↓ Overtime Policy	Yes
Complete	Chen, Jodi (Compliance Officer)	↓ Overtime Policy	Yes
Complete	Gifford, Tawna (Accounts Receivable Clerk)	↓ Overtime Policy	Yes
Complete	Breen, Darren (Personnel Manager)	↓ Overtime Policy	No
Complete	Martinez, Anna (Manager)	↓ Overtime Policy	No
15 30 60		Page 1 of 1 < > »	

- A supported report with the **Task Status** layout selected: In the **Data** section, click the **Complete** task status header to see individual tasks. Look at the **Tasks Completed on Localized Copy** column to see which of those tasks were rolled up from localized copies.

Data			
Tasks Status ▲ ✕		Find... 🔍	
Title	User	Publication Status	Task Completed on Localized Copy
Tasks Status: Complete (5) 5		100% Approved	
↓ Overtime Policy	Johnson, Douglas (Chief Executive Officer)	Approved	Yes
↓ Overtime Policy	Chen, Jodi (Compliance Officer)	Approved	Yes
↓ Overtime Policy	Gifford, Tawna (Accounts Receivable Clerk)	Approved	Yes
↓ Overtime Policy	Breen, Darren (Personnel Manager)	Approved	No
↓ Overtime Policy	Martinez, Anna (Manager)	Approved	No
15 30 60		Page 1 of 1 < > »	

- A supported report with the **Publication Status** layout selected: In the **Data** section, click the **Approved** or **Archived** publication status header to see individual tasks. Look at the **Tasks Completed on Localized Copy** column to see which of those tasks were rolled up from localized copies.

Data			
Publication Status		Find...	
Tasks Status	User	Title	Task Completed on Localized Copy
^ Publication Status: Approved (5)			
Complete	Johnson, Douglas (Chief Executive Officer)	↓ Overtime Policy	Yes
Complete	Chen, Jodi (Compliance Officer)	↓ Overtime Policy	Yes
Complete	Gifford, Tawna (Accounts Receivable Clerk)	↓ Overtime Policy	Yes
Complete	Breen, Darren (Personnel Manager)	↓ Overtime Policy	No
Complete	Martinez, Anna (Manager)	↓ Overtime Policy	No
15	30	60	Page 1 of 1 < > >>

Viewing Synced Questionnaire Results

Questionnaire information from synced copies can be included in any questionnaire report.

1. Click **Reports**, click **Questionnaire Reports**, and then click **Questionnaire Results by Document**, **Questionnaire Results by User**, or **Questionnaire Statistics**.
2. Do one of the following:
 - For a **Questionnaire Results by Document** or **Questionnaire Statistics** report, select at least one master document or master questionnaire with synced localized copies, plus any other documents/questionnaires you want to include, and then click **OK**.

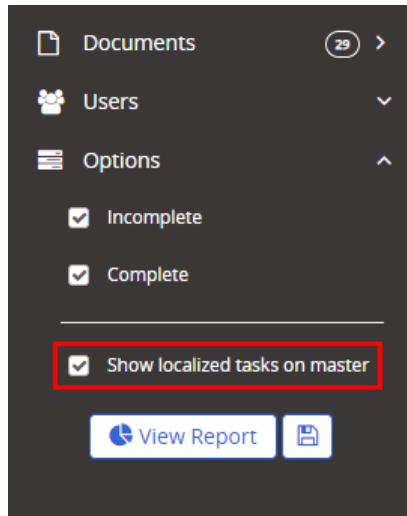
Notes:

- For detailed instructions, see "Selecting Documents" in the [Reports Supplement](#).
- The title of a master is preceded by a down arrow character (↓).
- Because questionnaires can be taken only after reading/completion tasks have been assigned, select a master in the published or archived status. Also, at least one of the localized copies must have been approved so that its reading/completion tasks have been assigned.

- For a **Questionnaire Results by User** report, select at least one user assigned to a synced localized copy, plus any other users you want to include, and then click **OK**.

Note: For detailed instructions, see "Selecting Users" in the [Reports Supplement](#).

3. Under **Options**, select **Show localized tasks on master**.



4. Click **View Report**.

The titles of localized copies are marked with an up arrow (↑).

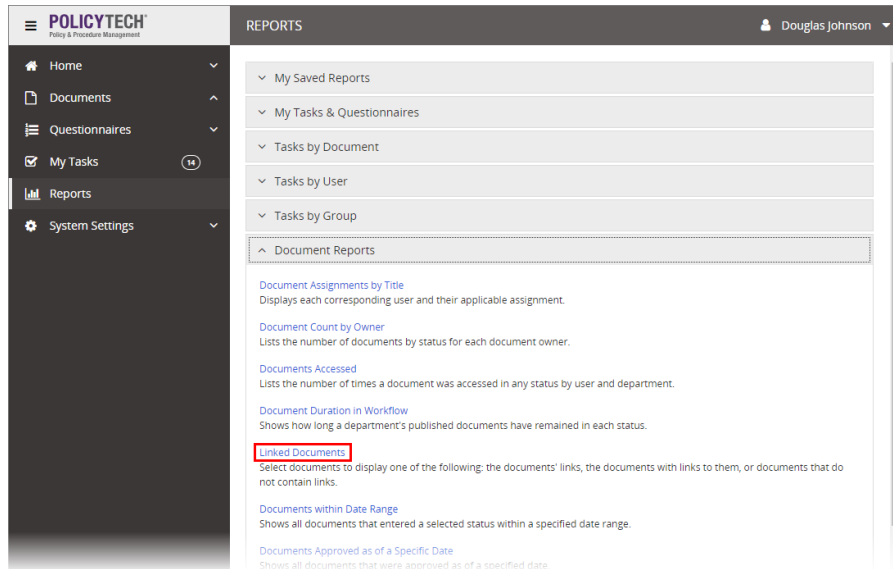
Layout: Questionnaire View

Data			
Title	Questionnaire Version	Question	Find...
Response	User	Attempt #	
↑ Title: ↑ Family and Medical Leave (1)	10		
↑ Questionnaire Version: 1 (7)	3		
↑ Question: 1: How long must an e...	10		
12 months	Jones, Anne (Chief Finance Offic...	1	
12 months	Cash, Jordon (Accounts Payable ...	1	
12 months	Cash, Jordon (Accounts Payable ...	2	
6 months	Woo, Josh (Accountant)	1	
[Incomplete]	Monson, Teresa (Chief Operatio...	-	
[Incomplete]	Johnson, Douglas (Chief Executi...	-	

Linked Localized Copies Report

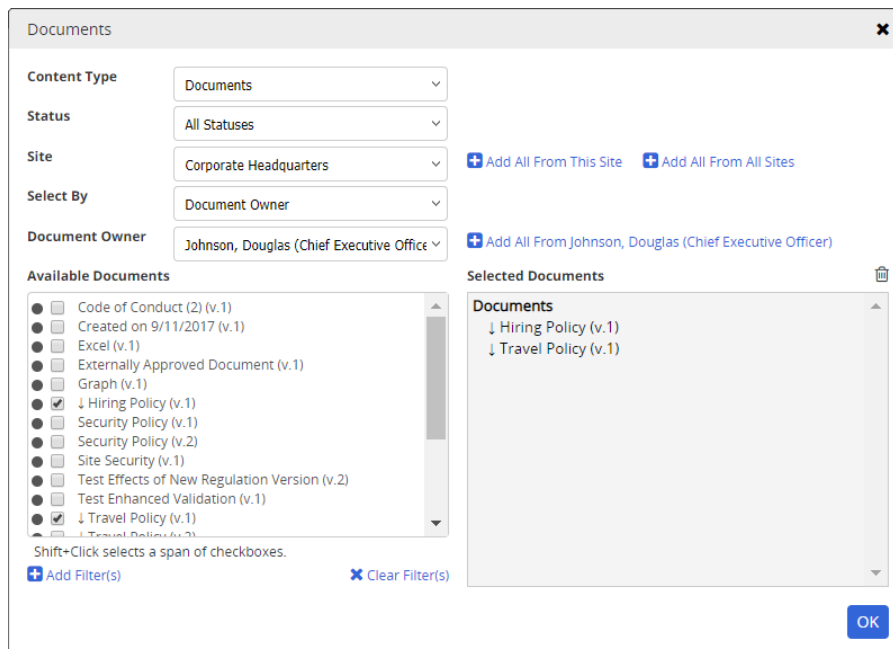
As a master document or questionnaire owner, you can use the Linked Documents report to generate a list of localized copies linked to selected master documents.

1. Click **Reports**.
2. Click **Document Reports**, and then click **Linked Documents**.



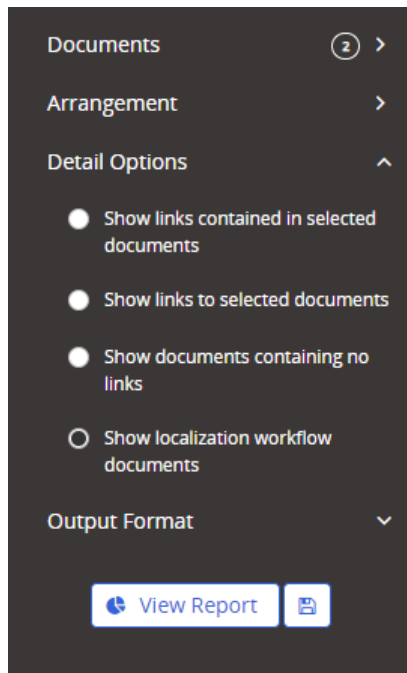
3. Select one or more master documents or questionnaires (for detailed instructions, see "Selecting Documents" in the [Reports Supplement](#)), and then click **OK**.

Note: Master document titles are preceded by a down arrow (↓).



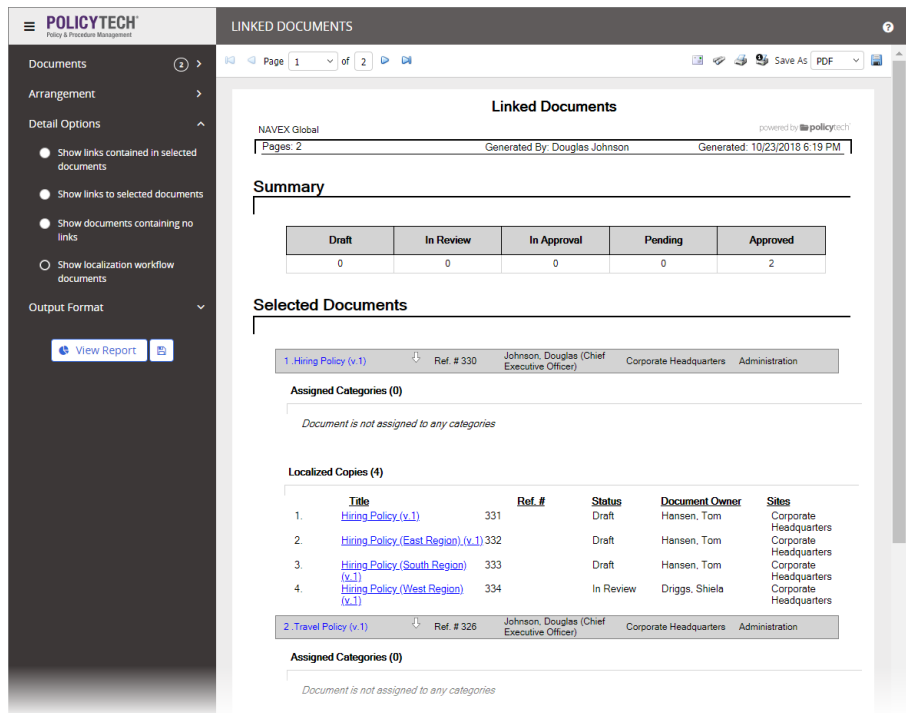
4. (Optional) Click **Arrangement** and do any of the following:
 - To change the default report columns, click **Show/Hide Columns**, and then click to clear a check box.

- By default, the document/questionnaire sort order in the report is ascending by title. To change what the documents/questionnaires are sorted by, click a different column heading. Click the same column heading again to reverse the sort order.
5. Click **Detail Options**, and then click **Show localization workflow documents**.



6. Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.
7. Click **View Report**.

If you chose the **Standard** output format, the report opens in the viewing pane to the right where you can view the report, search within it, send it to another PolicyTech user, print all or part of it, and save it to disk in several different formats (see [Working with a Finished Legacy Report](#) for details). If the report contains links, click a document or questionnaire link to open that document/questionnaire in PolicyTech or click a user name to open another report specific to that user.



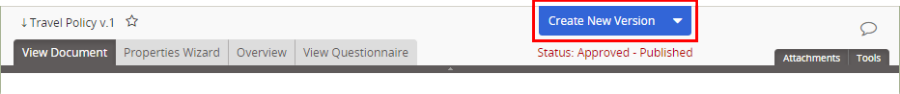
If you selected **Microsoft Excel Raw**, a separate browser window opens along with a Windows system prompt. After opening or saving the file, close the browser window.

1	Ref. #	Title (Version)	Localization Type	Assign Document Owner	Document Owner	Job Title	Site	Depart Status	Link Document Title	Link Document Status
2	293	Hiring Policy (Master Document)		Douglas	Johnson	Chief Exec Corporate HAdmin	Approved		Hiring Policy (Oregon) (v.1)	Draft
3	293	Hiring Policy (Master Document)		Douglas	Johnson	Chief Exec Corporate HAdmin	Approved		Hiring Policy (California) (v.1)	Draft
4	293	Hiring Policy (Master Document)		Douglas	Johnson	Chief Exec Corporate HAdmin	Approved		Hiring Policy (Idaho) (v.1)	Draft
5	293	Hiring Policy (Master Document)		Douglas	Johnson	Chief Exec Corporate HAdmin	Approved		Hiring Policy (North Carolina) (v.1)	Draft
6										
7										

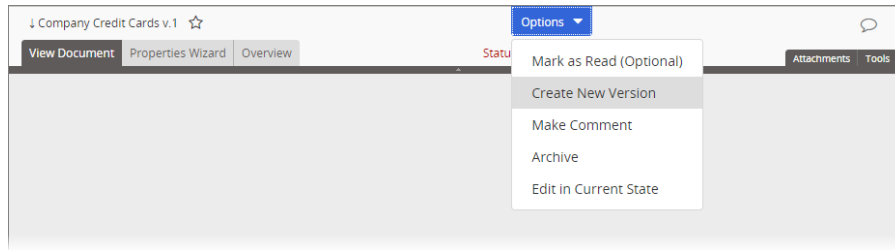
Creating a New Version of a Master Document/Questionnaire

To create a new version of a master document or questionnaire, it must have already been approved and be in the Pending or Published status.

- Open the approved master document or questionnaire, and then do one of the following:
 - If the document/questionnaire is in Published status, click **Create New Version**, and then click **Yes**.



- If the document/questionnaire is in Pending status, click **Options**, click **Create New Version**, and then click **Yes**.



A new version of the document/questionnaire opens in draft status with the **Properties Wizard** tab selected.

A screenshot of the 'Properties Wizard' form in a web application. The form is titled 'Travel Policy v.2' and has a status of 'Draft - Draft'. The left sidebar contains a list of steps: 1. Settings, 2. Categories, 3. Writers, 4. Reviewers, 5. Approvers, 6. Assignees, 7. Security, and 8. Localization Workflow. The main content area shows the 'Title' field with 'Travel Policy', the 'Document Owner' dropdown with 'Johnson, Douglas (Chief Executive Officer)', the 'Template' dropdown with 'Localization Workflow', and the 'Version Number' field with '2'. There are 'Reapply' and 'Preview' buttons next to the template dropdown. At the bottom right, there is a 'Reference #' of 326. At the bottom of the form, there are 'Save', 'Edit Document', and 'Next Step' buttons.

2. (Optional) Make any needed changes in the **Settings, Departments & Categories, Writers, Reviewers, Approvers, Readers, and Security** steps of the **Properties Wizard**.

Note: Changes made in these steps apply only to the master document/questionnaire and will not be reflected in the new versions of the localized copies.

3. Click the **Localization Workflow** step.

Travel Policy v.2

Submit to Writers Submit for Review

Edit Document Properties Wizard Overview Edit Questionnaire

Status: Draft - Draft

1 Settings

2 Categories

3 Writers

4 Reviewers

5 Approvers

6 Readers

7 Security

8 Localization Workflow

Default Document Owner Instructions

1024 character(s) left

Create New Localized Copy Connect an Existing Document

Localized Copies (3)

Change Settings for Selected Disconnect Delete Selected

	Title	Document Owner	Language	Sites	Status	Instructions
<input type="checkbox"/>	Travel Policy	Howard, Susan	English (English)	Corporate Headqua	Predraft	Please Translate into your site's language and change ...
<input type="checkbox"/>	Travel Policy	Breen, Darren	English (English)	Corporate Headqua	Predraft	Please Translate into your site's language and change ...

Back Save Edit Document

4. Do any of the following, as necessary:

- Update or add localization instructions (see [Changing Localization Instructions](#)).

Important: Localization instructions are your primary tool for communicating with localized copy owners. We highly recommend that you include in the instructions a detailed description of the changes made in the new version of the master document/questionnaire.

- Add or delete a localized copy (see [Adding or Deleting a Localized Copy](#)).

Note: Deleting an existing localized copy in predraft status does not delete any previous versions of that copy.

- Change localized copies' sync settings (see [Changing Sync Settings](#)).

5. To make content changes, do one of the following:

- If the master is a Word, Excel, or rich text document, click the **Edit Document** tab, and then make the needed changes.
- If the master is an uploaded file document, click the **Edit Document** tab, click the document title, and then do one of the following:
 - If the uploaded file type (its file name extension) has been enabled in PolicyTech, the file will open in the application currently designated in Windows as the default application for that file name extension. Make the needed changes and then save and close the

file. The modified file is automatically saved back into PolicyTech.

- If the uploaded file type has not been enabled in PolicyTech, you will be prompted to open or save the uploaded file. Save the file, open it in an application that can edit the file, and then save your changes. Back in the PolicyTech document with the **Edit Document** tab selected, click **Import/Overwrite**, and then upload the updated document to replace the previous version.

Important: If the master is a document, the contents of the new versions of the localized copies created from this new master version will initially be the same as the new master version. However, each localized copy owner can choose to replace these contents with those of the localized copy's previous version. This functionality is especially useful for when localized copies have been translated. A localized copy owner can restore the previously translated contents and then make the same changes in the translation as were made in the new master version rather than having to retranslate the entire document.

- If the master is a questionnaire, click the **Edit Questionnaire** tab, and then make the needed changes.
6. (Optional) If the master is a document, change or add a questionnaire (see "Changing a Questionnaire" or "Creating a Document Questionnaire" in the [User's Guide](#)). For details on how changing or adding a questionnaire in a master document affects its localized copies, see [Adding a Questionnaire to a Master Document](#).
 7. "(Optional) If the master is a document, add or update links and attachments (see "Attaching Files and Adding Reference Links" in the [User's Guide](#)).
 8. Submit the document/questionnaire for review or approval (see "Submitting a Document or Questionnaire for Review" or "Submitting a Document or Questionnaire for Approval" in the [User's Guide](#)).

Tasks for Localized Copy Owners

If you have been assigned to own a localized copy of a master document, you may need to complete one or more of the following tasks.

[Viewing Localization Instructions](#)

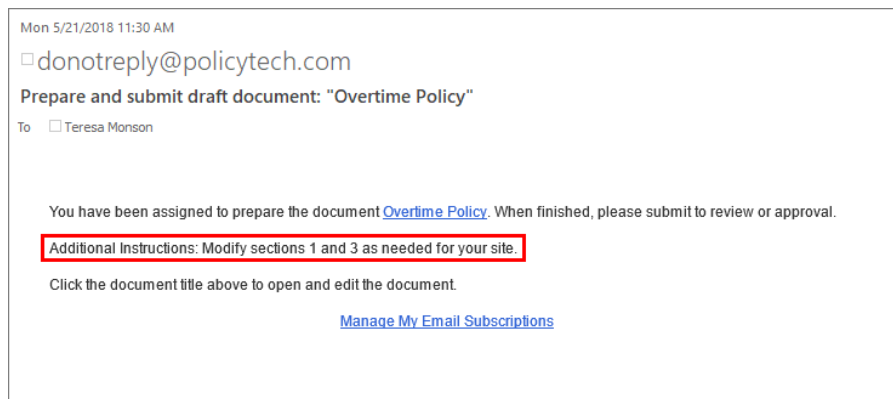
[Localizing a Copy of a Master Document/Questionnaire](#)

[Adding a Questionnaire to a Localized Copy](#)

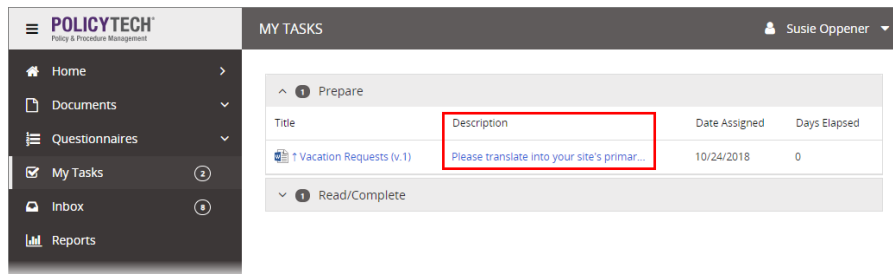
[Localizing a Synced Questionnaire](#)

Viewing Localization Instructions

When a master owner adds localized copies, that owner has the option of including localization instructions for the copy owners. Those instructions (if the master owner included them) are added to the email you receive notifying you that you've been assigned to own and localize a copy.



You can also see at least part of the instructions in **My Tasks**.



You can always access any included instructions in the copy document's **Properties Wizard**.

1. Open your assigned localized copy, click the **Properties Wizard** tab, and then click **Settings**.
2. In the **Settings** step, click **Document Owner Instructions**.

Note: If the Instructions box is empty, then the master owner did not include instructions for this localized copy.

1 Vacation Requests v.1 ☆ 🔒 Submit to Writers Submit for Review

Edit Document Properties Wizard Overview Edit Questionnaire ? Status: Draft - Draft

1 Settings 2 Categories 3 Writers 4 Reviewers 5 Approvers 6 Assignees 7 Security

Title Vacation Requests Advanced Settings →

Document Owner ⓘ Document Owner Instructions

Oppener, Susie (Director of Purchasing)

Template ⓘ Localization Workflow Reapply Preview

Version Number 1 Reference # 342

Save Edit Document Next Step

3. After reading the instructions, click **Close**.

Localizing a Copy of a Master Document/Questionnaire

When a document owner creates a master document or questionnaire using **Localization Workflow**, that document owner can assign any other document owners to copies that will be created for localization (translation or other modification) purposes. As soon as the master document/questionnaire is approved, the localization copies are placed in Draft status, and the assigned owners receive notification that the copies are ready to be localized.

Ways that Working with a Localized Copy is Different than Working with a Regular Draft Document/Questionnaire

In many ways, working with a localized copy is the same as working with any draft document or questionnaire. However, there are some differences that apply to all localized copies and some that depend on whether the owner of the master document/questionnaire synced it with this copy.

General Differences

- If you are the assigned owner of a localized copy and you do not own the master document/questionnaire, you will not be permitted to archive the localized in Draft status or in the Pending or Published status. This can only be done by the master document/questionnaire owner or an administrator.

- You cannot create a new version from within a localized copy. New versions must originate from the master document/questionnaire. When a new version of a master document/questionnaire is approved, new versions of its localized copies are moved to Draft.
- In the **Properties Wizard**, in the **Settings** step, the name shown for the **Template** setting will always be the template from which the current **Properties Wizard** default settings were taken. For example, if you select a different template and, when you click **Reapply**, you do not select **Properties** (such as when you choose to only replace document headers and footers), the template name will not change when the reapplication is finished.
- In the **Properties Wizard**, in the **Settings** step, in **Optional Settings**, The **Review Interval** and **Warning Period** options are not available. This is because document owners cannot create a new version from within a localized copy. New versions must originate from the master document/questionnaire.
- If this copy is a document, the **Compare/Replace** option is added to the **Editor Tools** menu. **Compare/Replace** includes options for comparing the localized copy with the master document and replacing the copy's new version content with the content of its previous version.
- You can view information about a localized copy's master document/questionnaire from the **Links** page on the **Overview** tab.
- If the master copy is a document that includes a questionnaire, or if the master copy is a stand-alone questionnaire, the localized copy inherits the master's questionnaire contents and settings.

Differences when Synced

You may notice the following differences when working with a questionnaire in a localized copy that is synced with the master's questionnaire.

- Each localized copy inherits the master's questionnaire.
- You can edit existing questionnaire questions, including their advanced settings, but you cannot add or delete questions.
- You can click **Compare to Master** to open the master's questionnaire in a separate browser window.
- The only questionnaire settings you can change are **Questionnaire Introduction** and **Disable Questionnaire**.
- If the copy is a document and a questionnaire has not been created in the master document, you cannot create one in the localized copy.
- If the owner of an approved master document edits the document in its current state and makes changes to the document's questionnaire, the

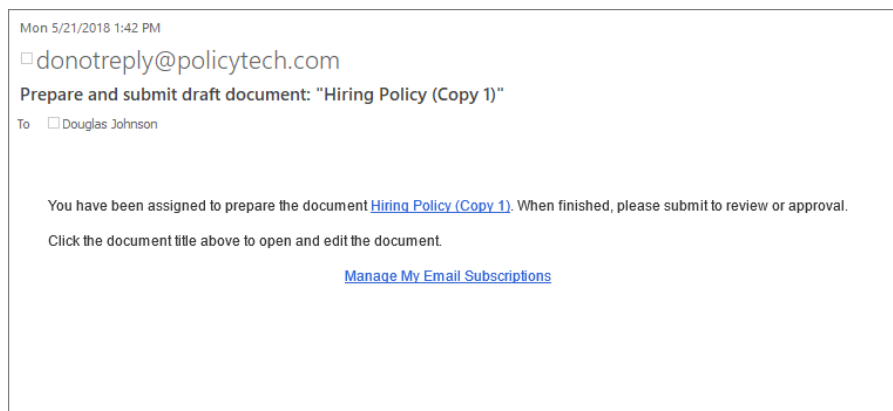
next time you click the **Edit Questionnaire** tab in the localized copy, you must choose whether to replace the current questionnaire with the modified questionnaire from the master document or to keep the current localized copy version.

Differences when Readers Are Auto-Assigned

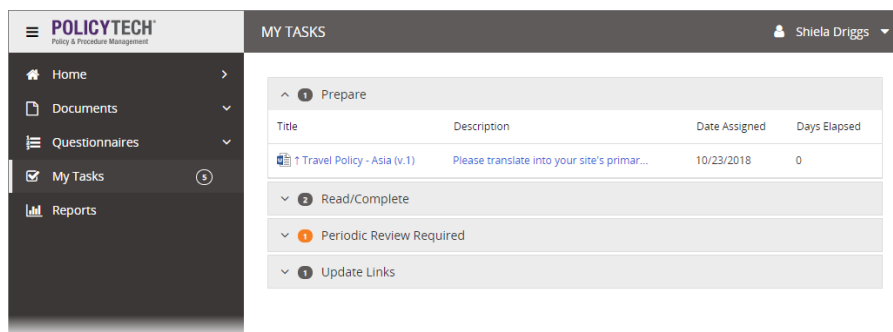
The master owner can have PolicyTech automatically assign readers to the localized copies in their selected languages. This does not affect your ability to assign readers in the **Properties Wizard**. You will, however, see the automatically assigned readers listed in the **Reader Status** page on the copy's **Overview** tab.

How to Localize a Copy Document

1. Do one of the following to open the document:
 - In the notification email, click the document title.



- Click **My Tasks**, click **Prepare** to show those tasks, and then click the document title.



2. Click the **Edit Document** tab, and then make the content changes needed to localize this copy document for its readers. This could include, among other things, translating the text into a different language or modifying text to be in line with local regulations.

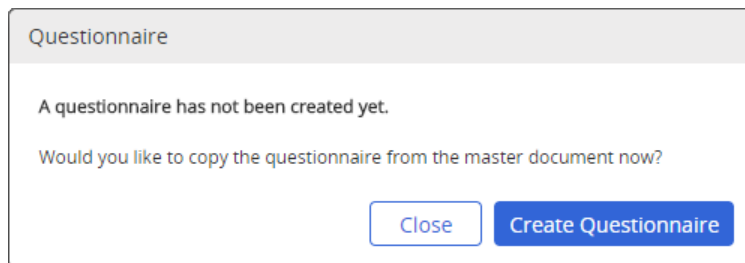
Note: If this localized copy is a Word document, while editing its content you can click **Editor Tools** and then click **Compare/Replace**. See [Working with Compare/Replace Options](#) for instructions on how to use this feature.

3. Click the **Properties Wizard** tab, and then make needed changes in any of the steps.

Notes:

- The **Properties Wizard** settings and assignments are determined by the template selected by the master document owner when adding this copy. A master document's **Properties Wizard** settings and assignments do not affect a copy's **Properties Wizard**.
- The template name displayed as the **Document Template** setting will always be the template from which this document's current default **Properties Wizard** settings were taken. For example, if you select a different template but choose not to reapply **Properties** (such as when you choose to reapply only document headers and footers), the displayed template selection will not change after completing the reapplication.

4. Click the **Edit Questionnaire** tab to see if a questionnaire is included, and then do one of the following, depending on what you see:
 - If you see a prompt like the one below, the master document has not been synced with this copy and the master document has no questionnaire. If desired, you can add a questionnaire to this copy just as you would with any document. See "Creating a Document Questionnaire" in the [User's Guide](#) for detailed instructions.



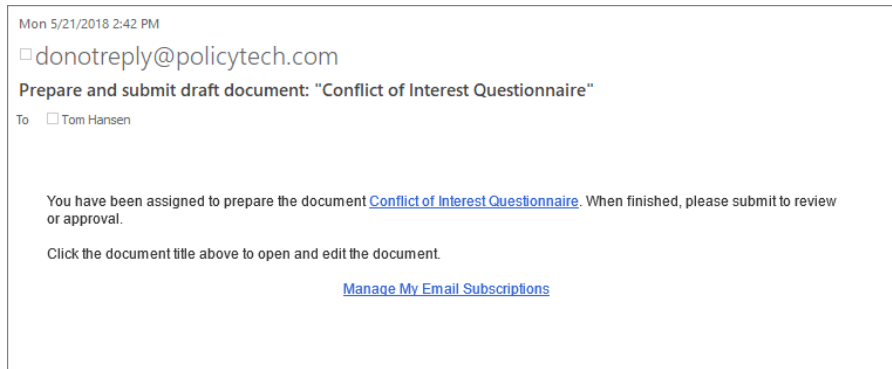
- If a questionnaire is immediately displayed, it was inherited from the master document.
 - If you see the text highlighted in the screenshot below, then this localized copy's questionnaire is synced with the master document's questionnaire, which limits what you can edit. Follow the instructions in [Localizing a Synced Questionnaire](#).

- If the questionnaire is not synced with the master document's questionnaire, see "Changing a Questionnaire" in the [User's Guide](#) for further instructions.
- If you see an alert like the one below, the master document has been synced with this localized copy and, because there is currently no questionnaire in the master document, there is no questionnaire in this localized copy, nor can you add one.

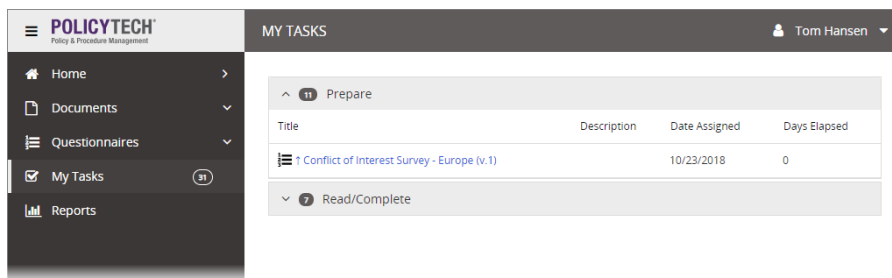
5. Do one of the following:
 - If you are finished with the document for now, click **Options**, and then click **Save and Close**.
 - Submit the document for collaboration, review, or approval (see "Submitting a Document or Questionnaire to Writers, Reviewers, or Approvers" in the [User's Guide](#)).

How to Localize a Copy that Is a Questionnaire

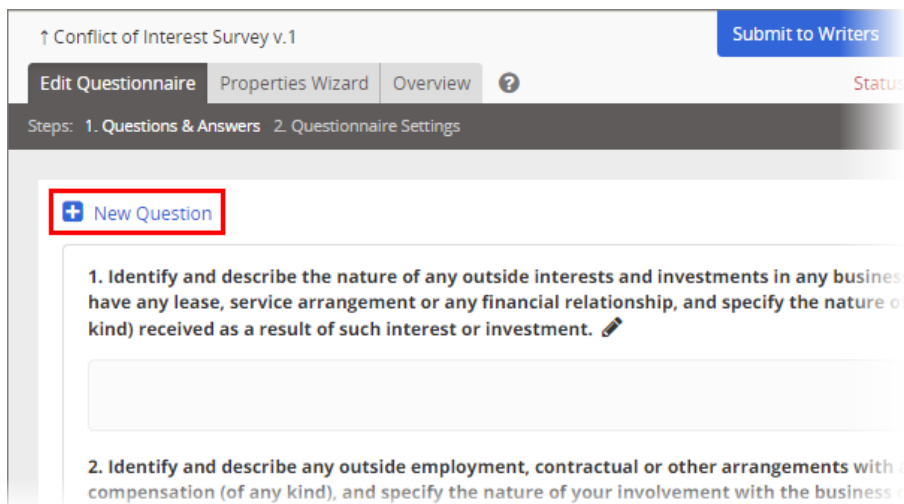
1. Do one of the following to open the questionnaire copy:
 - In the notification email, click the questionnaire title.



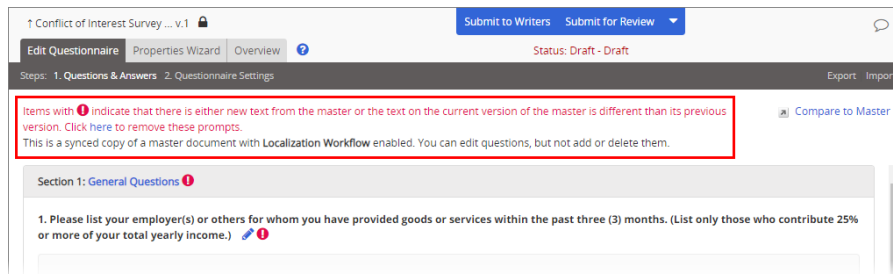
- Click **My Tasks**, click **Prepare** to show those tasks, and then click the questionnaire title.



2. Whatever questionnaire content and settings were added to the master questionnaire also appears in your copy in the **Edit Questionnaire** tab. What you can do with the inherited content and settings depends on whether the master owner synced the questionnaire. Do one of the following:
 - If you see the **New Question** option, this questionnaire copy is not synced with the master questionnaire. You can freely edit all questions and answers, delete them, or add new ones (see "Changing a Questionnaire" in the [User's Guide](#) for further instructions).



If you see the text highlighted in the screenshot below, then this localized copy's questionnaire is synced with the master's questionnaire, which limits what you can edit. Follow the instructions in [Localizing a Synced Questionnaire](#).



2. Click the **Properties Wizard** tab, and then make needed changes in any of the steps.

Notes:

- The **Properties Wizard** settings and assignments are determined by the template selected by the master document owner when adding this copy. A master document's **Properties Wizard** settings and assignments do not affect a copy's **Properties Wizard**.
- The template name displayed as the **Document Template** setting will always be the template from which this document's current default **Properties Wizard** settings were taken. For example, if you select a different template but choose not to reapply **Properties** (such as when you choose to reapply only document headers and footers), the displayed template selection will not change after completing the reapplication.

5. Do one of the following:
 - If you are finished with the document for now, click **Options**, and then click **Save and Close**.
 - Submit the document for collaboration, review, or approval (see "Submitting a Document or Questionnaire to Writers, Reviewers, or Approvers" in the [User's Guide](#)).

Working with Compare/Replace Options

The **Compare/Replace** feature is available whenever you're editing a localized copy that is a Microsoft® Word document. The available **Compare/Replace** options depend on whether the localized copy is the first version or a subsequent version.

If the localized copy is the first version created from the first version of the master document, you can compare the contents of the localized copy to the master document's content at any time.

If the localized copy is a second or later version, you can use **Compare/Replace** options to do any of the following:

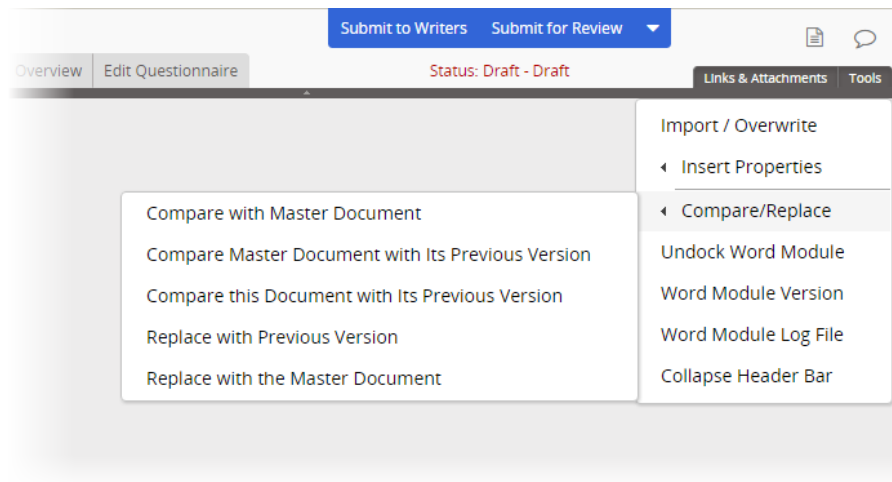
- Compare this localized copy's content with that of the master document
- Compare the current version of the master document with its previous version
- Compare the content of this localized copy's version with its previous version
- Replace the content of the current localized copy version with that of its previous version
- Replace the content of the current localized copy version with that of the master document

Important: The compare options require that the desktop version of Word be installed on your computer.

To use a **Compare/Replace** option,

1. Open a localized copy, and then click the **Edit Document** tab.

Note: In a document list, a localized copy title is preceded by an up arrow (↑).



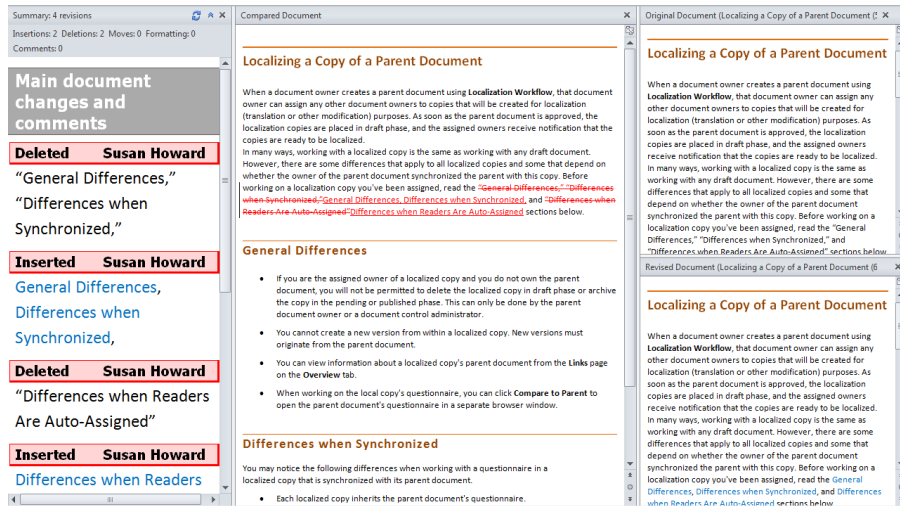
2. Click **Tools**, point to **Compare/Replace**, and then do one of the following:

Note: The first option listed below is always available. The other four options are available only if new versions of the master document and localized copy have been created.

- Click **Compare with Master Document** to open Word with both the localized copy and its master document displayed in the **Compare** view.

Note: The default **Show Source Documents** setting in Word is **Show**

Both, as shown in the screenshot below. If you have changed that setting in Word, your screen will look different.



- Click **Compare Master Document with Its Previous Version** to open Word and display the differences between the master document's current and previous versions.
- Click **Compare this Document with Its Previous Version** to open Word and display the differences between this localized copy version and its previous one.
- Click **Replace with Previous Version**, and then click **Yes** to replace the currently displayed content with the content from this localized copy's previous version.
- Click **Replace with the Master Document**, and then click **Yes** to replace the currently displayed content with the content from the master document.

Note: When a new localized copy version is created, it inherits content either from the new version of the master document or from the localized copy's previous version, depending on how PolicyTech is currently set up. The "Replace" options let you override the default content inheritance.

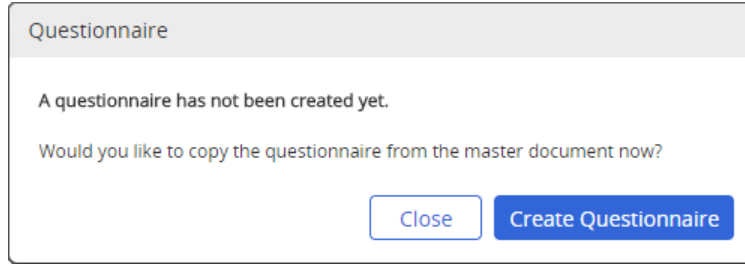
Adding a Questionnaire to a Localized Copy

You may or may not be able to add a questionnaire to a localized copy, depending on whether the master document owner has synced the master and its copies.

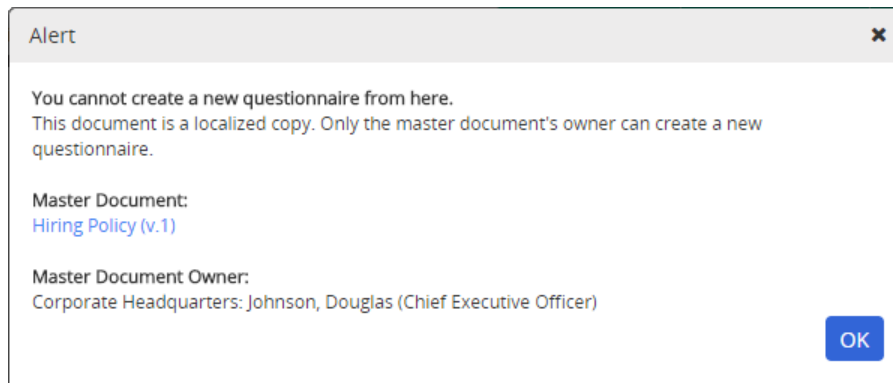
1. Find and open the localized copy that you want to add a questionnaire to.

Note: In a document list, a localized copy title is preceded by an up arrow (↑).

2. Click the **Edit Questionnaire** tab, and then do one of the following, depending on the state of this localized copy in relation to its master document:
 - If you see a prompt like the one below, the master document has not been synced with this copy and the master document has no questionnaire. You can add a questionnaire to this copy just as you would with any document. See "Creating a Document Questionnaire" in the [User's Guide](#) for detailed instructions.



- If this localized copy has not been synced with the master document and a questionnaire has been added to the master, this copy inherited that questionnaire and you will see its contents. You can freely edit the questionnaire, including adding and deleting questions or disabling the questionnaire. See "Changing a Questionnaire" in the [User's Guide](#) for detailed instructions.
- If the master document has a questionnaire and is synced with this localized copy, this copy has inherited the same questionnaire. You will be able to edit (localize) questions, answers, and the introductory text (see [Localizing a Synced Questionnaire](#)), but you cannot replace the questionnaire.
- If this localized copy has been synced with the master document and a questionnaire has not been added to the master, you will see a prompt like the one below and you will not be able to add a questionnaire to the localized copy.



Localizing a Synced Questionnaire

If the localized copy you are working with has been synced with its master document and the master includes a questionnaire, the copy has inherited that questionnaire. You can localize (translate or otherwise modify) the text for the following questionnaire elements:

- Section headings
- Questions
- Answers
- Question feedback
- Questionnaire introduction

Important: If you are translating a questionnaire, be sure to replace questionnaire text with exact translations so that the integrity of reports that include questionnaire results is maintained.

You can also change an answer's advanced settings or disable the questionnaire altogether.

You cannot make any of the following changes:

- Add or delete a section
- Add or delete a question
- Change a question's type
- Move a question to a different section
- Change answer settings (whether only one or any answer is acceptable; which is the correct answer)
- Change any settings on the **Questionnaire Settings** page, except for **Questionnaire Introduction** and **Disable Questionnaire**.

You can localize a synced questionnaire by either editing it directly in the **Edit Questionnaire** tab of the copy document or by preparing and importing a Microsoft® Excel® file that the master document owner has exported and sent to you. Go to the section topic below for your preferred method.

[Directly Edit a Synced Questionnaire](#)

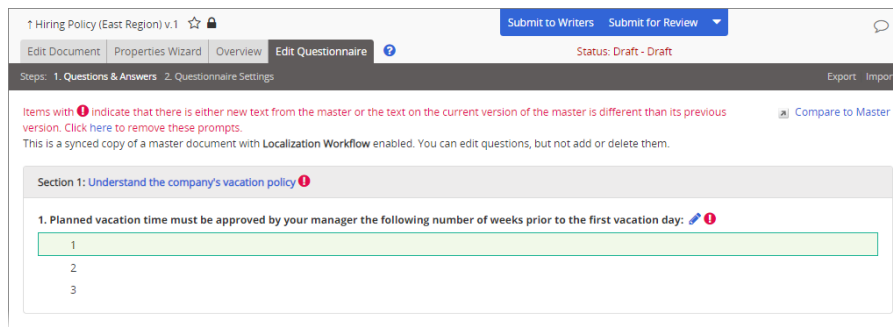
[Prepare and Import a Questionnaire Translation File](#)

Directly Edit a Synced Questionnaire

1. Open the localized copy of the document or questionnaire while it is in the Draft, Collaboration, Review, or Approval status.

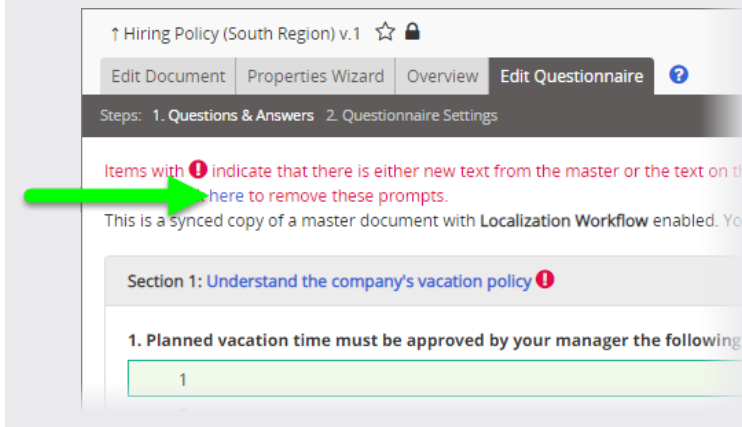
Note: In a document/questionnaire list, a localized copy title is preceded by an up arrow (↑).

2. Click the **Edit Questionnaire** tab. The questionnaire appears exactly as it was created in the master document, with the exception that the **i** alert appears next to each piece of text that can be considered for localization (be translated or otherwise modified for your location).



Notes:

- The **i** alert is hidden for a specific piece of text once it is modified in any way and no longer matches the text in the master questionnaire.
- At any time while working on the questionnaire you can click **Compare to Master** to open the master questionnaire in a separate browser window.
- To clear all alerts, click the [here](#) link in the alert at the top of the questionnaire.



3. To localize section heading text in a document questionnaire, in a section heading, click the text, make needed changes, and then click **Save**.
4. For each question you need to localize, click **i** after the question text, and then do any of the following:

- Localize the **Question** text.
 - If this is not an open-ended question, localize the text for each answer.
 - For each answer, click **Options**, click **Advanced Settings**, make changes to the **Create Exception** and **Create Task** settings, and then click **Save**.
 - If feedback has been enabled, localize the **Feedback** text.
 - In any **Section** header of a document questionnaire, click the section text, localize it, and then click **Save**.
5. In the **Question** window, click **Save and Close**.
 6. Click **Questionnaire Settings**, and then localize the **Questionnaire Introduction** text.
 7. Click **Save**.

Prepare and Import a Questionnaire Translation File

1. Find and open the questionnaire translation file that the master document owner sent or gave you access to.

Note: The name of a questionnaire translation file (a Microsoft® Excel® file) is in the following format: **[document ID]_[language code]_QuestionnaireForTranslationExportFiles_[year, month, hour, minute, second].xls**. For example: **371_fr-FR_QuestionnaireExportForTranslationFile_2014_09_30_10_06_40.xls**.

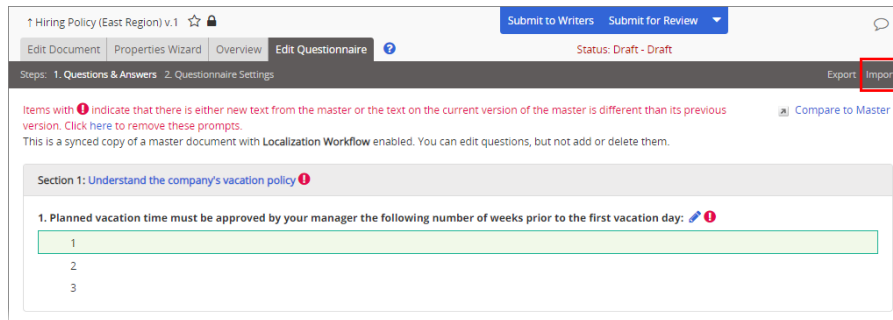
The contents of the file will look similar to the those shown below.

	A	B	C	D
1	Key (Do Not Edit)	Current Text (Do Not Edit)	Translation (Edit This)	
2	Introduction:14			
3	Objective:22	General Questions		
4	Question:39	How many overtime hours may a part-time		
5	Answer:94	1		
6	Answer:95	2		
7	Answer:96	3		
8	Answer:97	4		
9	Question:40	An employee, whether full-time or part-time, must receive manager approval		
10	Answer:98	True		
11	Answer:99	False		
12	Question:41	What are the total hours (combined regular and overtime) a part-time employee		
13	Answer:100	20		

2. In the **Translation (Edit This)** column, type the translations for or modifications of the text in the **Current Text (Do Not Edit)** column. To use a piece of current text as it is, leave its corresponding translation cell empty.

Note: The spreadsheet is protected so that you don't accidentally make changes to the text in the first two columns.

- When you're finished adding translations or modifications, save the file.
- Open the localized copy with the questionnaire that corresponds with the translation file you prepared.
- Click **Edit Questionnaire**, and then, near the upper right corner of the window, click **Import**.



- Click **Browse**, find and click the translation file, and then click **Open** to add the file name to the **Import Questionnaire** box.



- Click **Import**, and then, when the process has finished, click **OK**.

Note: If you ever need to modify the imported text, you can either change it directly in the **Edit Questionnaire** tab, or you can export it using the **Export** option in the localized copy, make the needed changes, and then re-import it.

Working with a New Version of a Localized Copy

When a new version of a master document or questionnaire is created, new versions of its localized copies are automatically created as soon as the new master version is approved. As a localized copy owner, you will receive notification and a task to review the new version and submit it for review and approval.

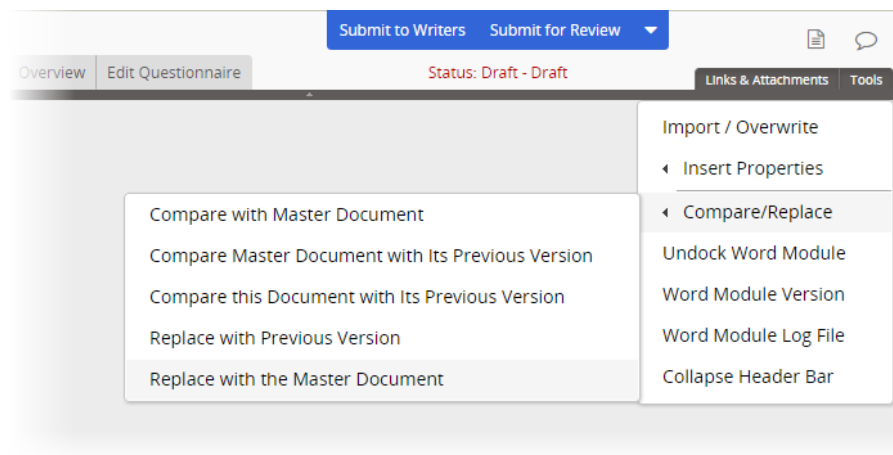
Preparing a New Version of a Document Copy

If the master is a document that was created in Microsoft® Word, you can handle the new version in different ways, depending on the scope of the new version's changes and the scope of the changes you made to the previous

version. You may want to relocalize or retranslate the new version text inherited from the master document, or you may want to keep the previous version's text and make in it the same changes made in the master copy's new version.

1. To open the new version of your localized copy, click the title in the notification email or in the new task in **My Tasks**.
2. Decide on one of the following options for preparing the new version of your localized copy:
 - **Start with the contents of the master document's new version.** It is typically best to use this method when the localized copy is in the same language as the master document and the changes you made to localize the previous version of the copy were minimal.

Depending on how PolicyTech is currently set up, the current contents of this localized copy may have been inherited from the new version of the master document or from this localized copy's previous version. To make sure that you're starting with the master document's contents, with the **Edit Document** tab selected, click **Tools**, point to **Compare/Replace**, and then click **Replace with the Master Document**.



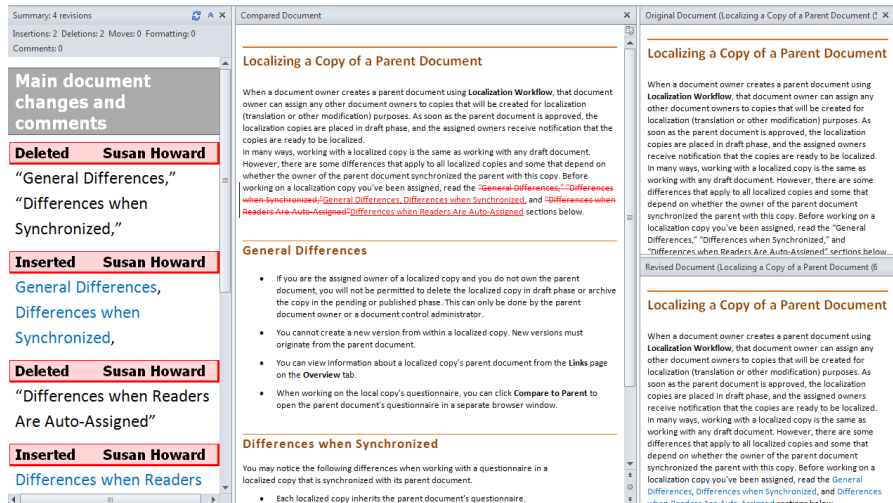
- **Start with the contents of this localized copy's previous version.** You might choose this method if, in order to localize your copy, you translated the previous version's text or made other significant changes that you don't want to completely redo.

Depending on how PolicyTech is currently set up, the current contents of this localized copy may have been inherited from the new version of the master document or from this localized copy's previous version. To make sure that you're starting with this localized copy's previous contents, with the **Edit Document** tab selected, click **Tools**, point to **Compare/Replace**, and then click **Replace with Previous Version**.

3. (For Word documents only) To see the changes made in the new version of the master document, with the **Edit Document** tab selected, click **Tools**, point to **Compare/Replace**, and then click **Compare Master Document with Its Previous Version**.

Note: If the document is not a Word document, you'll need to open both the previous and the new version of the master document and do a side-by-side comparison.

The comparison is displayed in a separate window.




4. Update or relocalize the localized copy contents by doing one of the following:

- If the localized copy is a Word, Excel, or rich text document, click the **Edit Document** tab, and then make the needed changes.
- If the localized is an uploaded file, click the **Edit Document** tab, click the document title, and then do one of the following:
 - If the uploaded file type (its file name extension) has been enabled in PolicyTech, the file will open in the application currently designated in Windows as the default application for that file name extension. Make the needed changes and then save and close the file. The modified file is automatically saved back into PolicyTech.
 - If the uploaded file type has not been enabled in PolicyTech, you will be prompted to open or save the uploaded file. Save the file, open it in an application that can edit the file, and then save your changes. Back in the PolicyTech document with the **Edit Document** tab selected, click **Import/Overwrite**, and then upload the updated document to replace the previous version.


5. Check to see if the localized copy's supplemental materials need updating (see "Reviewing Supplementary Materials" in the [User's Guide](#)).
6. Click the **Edit Questionnaire** tab to see if a questionnaire was added or if an existing questionnaire was modified. If a questionnaire exists, localize or translate its contents as needed.

Notes:

- What you see when you click **Edit Questionnaire** depends on whether this localized copy's questionnaire has been synced with the master's and may depend on whether the master copy includes a questionnaire. See [Adding a Questionnaire to a Localized Copy](#) for details.
- If this localized copy's questionnaire has been synced with the master copy questionnaire, then the copy's questionnaire is compared to the master's questionnaire. Any copy questionnaire text that was previously localized (modified in any way from the master questionnaire text) is retained but is marked with a  alert if the corresponding master questionnaire text has changed in the new version and may need to be relocalized.

7. (Optional) Click the **Properties Wizard** tab and make setting and task assignment changes as necessary.


Note: Creating a new version of a master document does not affect **Properties Wizard** settings in localized copies. New versions of localized copies are created with the same settings and task assignments as their previous versions.

8. Do one of the following:
 - Submit the new version for review or approval.
 - Click , and then click **Save and Close**.

Preparing a New Version of a Questionnaire Copy

1. With the **Edit Questionnaire** tab selected, localize the new version's questionnaire text as needed.
2. (Optional) Click the **Properties Wizard** tab and make setting and task assignment changes as necessary.

Note: Creating a new version of a master does not affect **Properties Wizard** settings in localized copies. New versions of localized copies are created with the same settings and task assignments as their previous versions.

3. Do one of the following:
 - Submit the new version for review or approval.
 - Click , and then click **Save and Close**.