

## Properties Wizard Setup

Define document properties in 7 steps.

### 1. Settings (Required).

Assign a title, owner, and template and adjust optional settings as necessary.

Family and Medical Leave v.1

Edit Document Properties Wizard Overview Edit Questionnaire

- Settings
- Categories
- Writers
- Reviewers
- Approvers
- Assignees
- Security

Title  
Family and Medical Leave

Document Owner  
Hansen, Tom (Manager)

Template  
-- Blank Word Document --

Version Number  
1

### 2. Departments (Required) & Categories (May be required or optional).

Assign the departments the document applies to and assign categories to group with like documents.

Family and Medical Leave v.1

Edit Document Properties Wizard Overview Edit Questionnaire

- Settings
- Categories
- Writers
- Reviewers
- Approvers

First: Choose which sites can access this document

Next: Choose where this document will be displayed

- Required
- Departments
- Optional
- Document Type
- OSHA

### 3. Writers (Optional).

Select writers to help write the document.

### 4. Reviewers (Optional).

Select reviewers to check content and writing style.

### 5. Approvers (Required).

Select approvers who determine if the document is ready for publication and take ultimate responsibility for content and correctness.

Family and Medical Leave v.1

Edit Document Properties Wizard Overview Edit Questionnaire

- Settings
- Categories
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- Approvers
- Assignees

Select From Site  
Approvers Corporate Headquarters

Search

- Chen, Jodi (Compliance Officer)
- Christenson, Robert (Administrator)
- Gatos, Will (Chief Information Officer)
- Howard, Susan (Administrator)
- Johnson, Douglas (Chief Executive Officer)
- Jones, Anne (Chief Finance Officer)
- Monson, Teresa (Chief Operations Officer)

### 6. Assignees (Optional).

Assign those who must attest to reading and understanding the document.

### 7. Security (Optional).

If necessary assign a restricted security level to limit document access.

Family and Medical Leave v.1

Edit Document Properties Wizard Overview Edit Questionnaire

- Settings
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- Approvers
- Assignees
- Security

Security Level

- All Users  
Users can view this document. (Example: Any user links in the Overview.)
- Restricted - High  
Users can view this document. (Example: Reviewers only.)
- Restricted - Severe  
Users can view this document. (Example: Assignees only.)

**Note:** To support using PolicyTech on multiple devices, the user interface is responsive to screen and window size. In smaller spaces, labeled options become icons or are moved to remain accessible.

Submit to Writers Submit for Review

Family and Medical Leave v.1

Edit Document Properties Wizard Overview Edit Questionnaire

- Title
- Categories
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- Approvers
- Assignees
- Security

Title  
Family and Medical Leave

Document Owner  
Hansen, Tom (Manager)

Template  
-- Blank Word Document --

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1

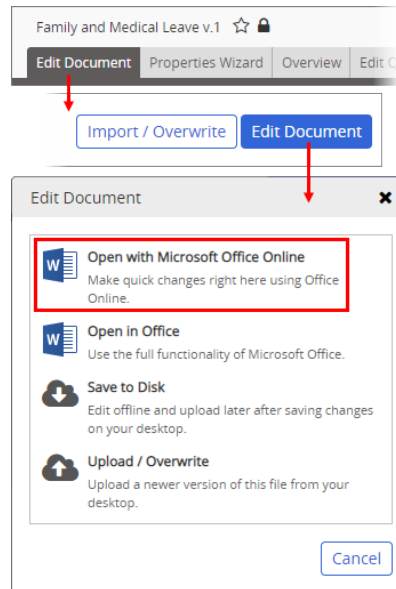
Reference # 34

Save Edit Document Next Step

## Edit Document Content

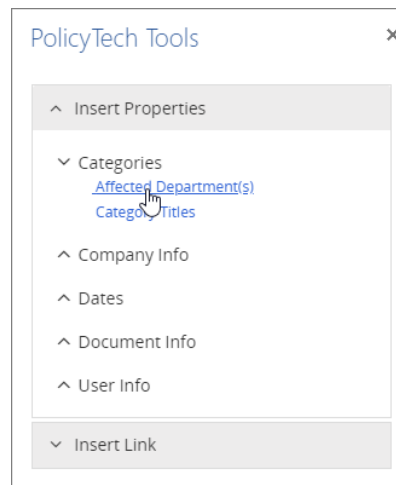
### 1. Edit using Word Online.

Click the **Edit Document** tab, click the **Edit Document** button, and then click **Open with Microsoft Office Online**.

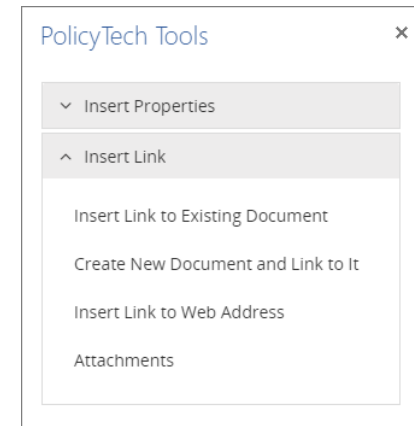


### 2. Insert a Properties Field.

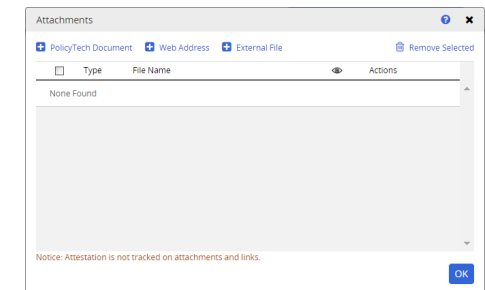
From the **Insert Properties** menu in the **PolicyTech Tools** pane, you can insert automatically populated data fields containing document properties, such as the document owner or approval date.



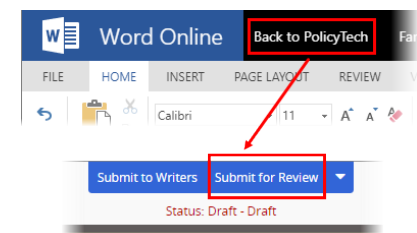
3. **Link to a Document or Website.** Place the cursor where you want a link inserted, click to expand the **Insert Link** menu, click a link option and follow the prompts.



4. **Attach a File.** In the **Insert Link** menu, click **Attachments**, click an attachment type and follow the prompts.



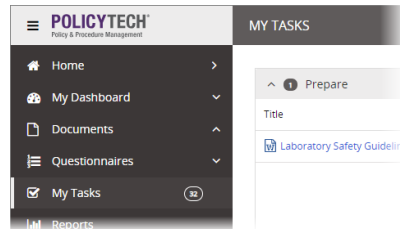
5. **Submit for Review or Approval.** Click **Back to PolicyTech**, click **Submit for Review** and follow the prompts (or click **Submit for Approval** and follow the prompts).



## Handle "Track Changes" Feedback

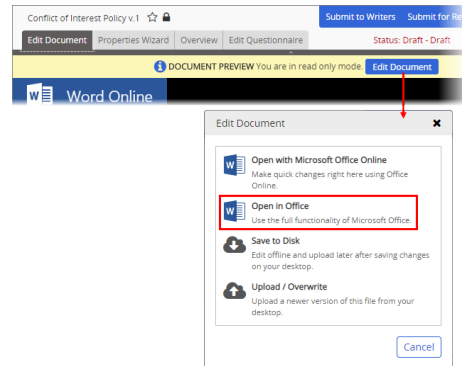
You can quickly view feedback from reviewers or approvers.

**1. Reviewer or Approver Feedback.** If a reviewer or approver chooses to revise the document, it is sent back to you with an explanation.



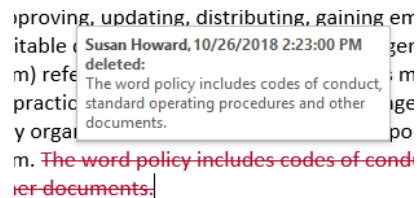
**2. View Tracked Changes.**

To see tracked changes, open the document in your desktop version of Word. In the **Edit Document** tab, click the **Edit Document** button and click **Open in Office**.

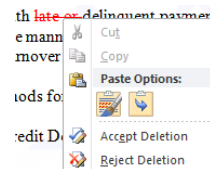


**2. Track Changes Details.**

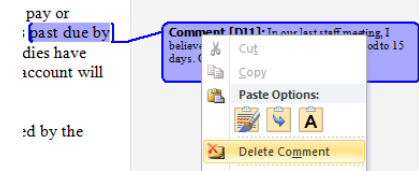
Hover the cursor over a change to see who made it.



**3. Accept or Reject a Change.** Right-click a marked change and click **Accept** or **Reject**.



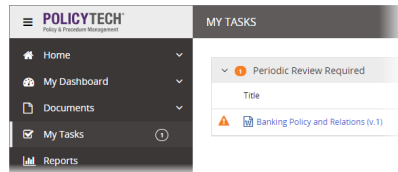
**4. Comments.** After reading a comment, right-click it and click **Delete Comment**.



## Do a Periodic Review

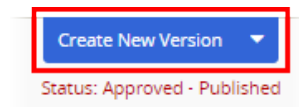
You may be asked to review a document at specified intervals.

- 1. Periodic Review Task.** At a designated time before a periodic review comes due you receive a task assignment in a notification email and in **My Tasks**.



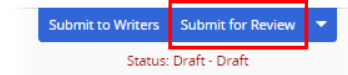
- 2. Review the Document.**

Check the document to see if changes are needed. If so, click **Create New Version** and click **Yes**.



- 3. Make Changes.** The document opens in draft mode where you can make changes to content, **Properties Wizard** settings, attachments, and the questionnaire.

- 4. Submit.** When finished updating, submit the new version for review or approval.



- 5. No Revision Necessary.** If you determine that no changes are needed, instead of creating a new version, click **Options** and click **No Revision Necessary**, which resets the review date for another period.

