PolicyTech® 10.6 Quick Reference — Reviewer (revisions via Office Online Integration)

NAVEX GLOBAL®

Access a Document

You can access the document in two ways:

- In your email application, open the **Review required** message and click the link. You received this email because you were assigned as a reviewer.
- In PolicyTech, click My Tasks and find the document under Review. You have this task because you were assigned as a reviewer.

If the document is currently checked out, you can select **Notify me by email when the document is no longer checked out**. Or, you can simply click **OK** to continue viewing the document in read-only mode.



Questionnaires

🗹 My Tasks



Read/Complete

Review a Document

You can choose one of several responses:

- Accept. Accept the document as accurate and complete, thus indicating the document is ready to move to approval.
- Discuss. To possibly avoid restarting the review and approval process, first consider starting a discussion to resolve issues.
- Revise. Directly edit the document content, which sends the document back to its owner when all reviewers have finished. (See the "Revise a Document" section on the next page for detailed instructions.)
- **Decline.** When you decline a document, provide a reason.











Revise a Document

- Revise. To directly edit the document content, click Revise and click Revise again to confirm.
- 2. If you have desktop Word, click **Open in Office** so you can see tracked changes you and other reviewers have made.

Otherwise, click **Open with Microsoft Office Online**. Your changes will still be tracked—you just won't see redlining and other change notations in the text.

 If you can see tracked changes, place your cursor over a change to see who made it and when.

4. Do one of the following:

If you're working in desktop Word, save the revised document and close Word. If you're working in Word Online, click **Back to PolicyTech**.





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4. Click Done Revising, explain your revisions, click Save and OK.

