POLICYTECH®
Policy & Procedure Management

NAVEXGLOBAL®

System Update – Version 10.6

NAVEX Global will update PolicyTech® Policy and Procedure Management on 13 November 2018.

Feature Updates

Redesigned User Finder
Office Online Integration
New Questionnaire Reports
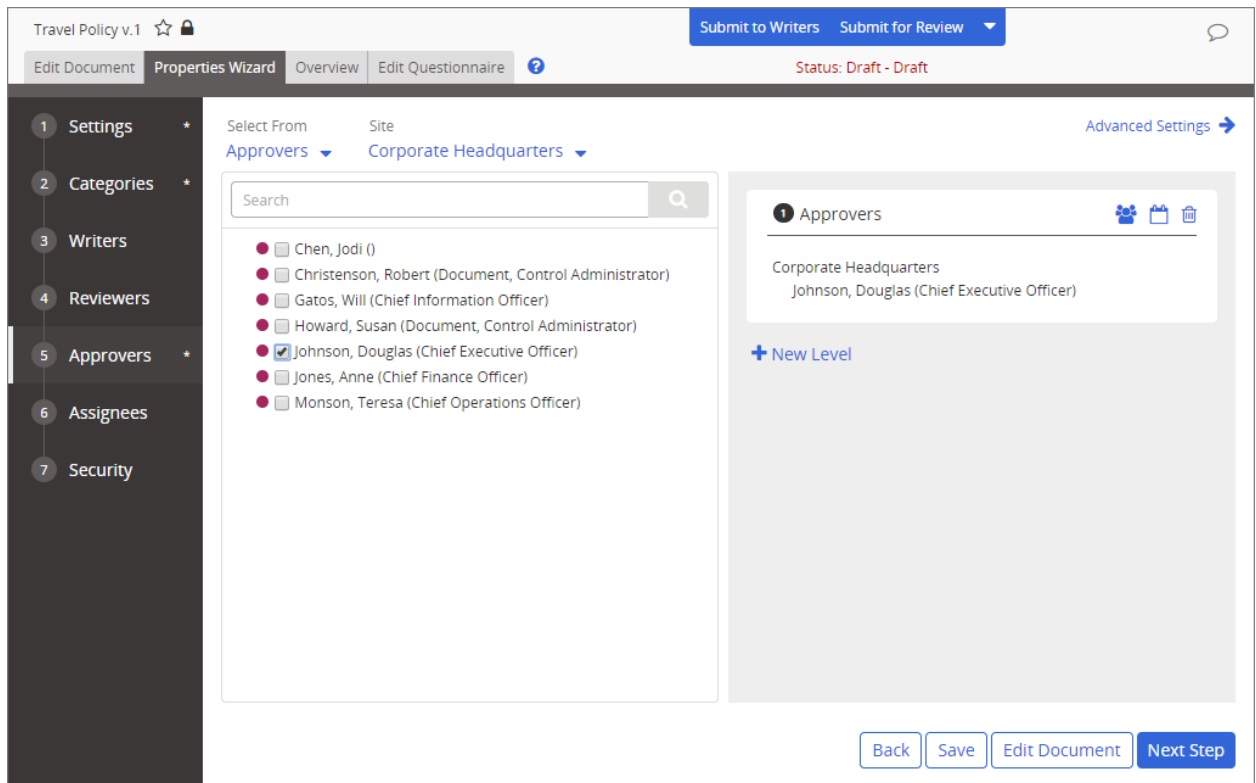**User Interface Updates**

Redesigned User Finder
Selecting users when setting up a document in the Properties Wizard is now a cleaner and simpler experience.

User Finder before 13 November release

Here are some highlights of this redesign:

Entity selection. You now choose the type of entity you want to select from by clicking the *Select From* control and then selecting from a list.
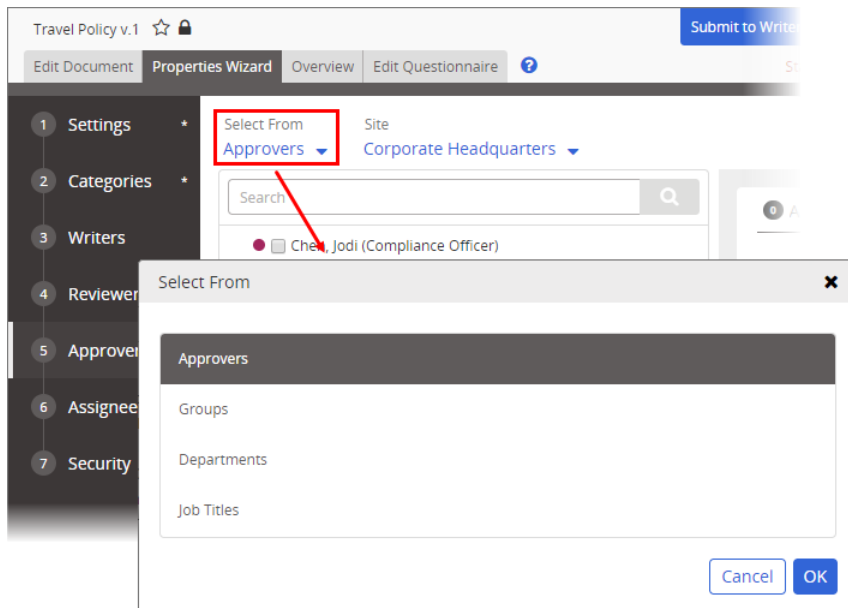
And, as an administrator, you control which entity type is selected by default in the User Finder (*System Settings > Document Setup > Default Properties > Default Properties Wizard Views*).
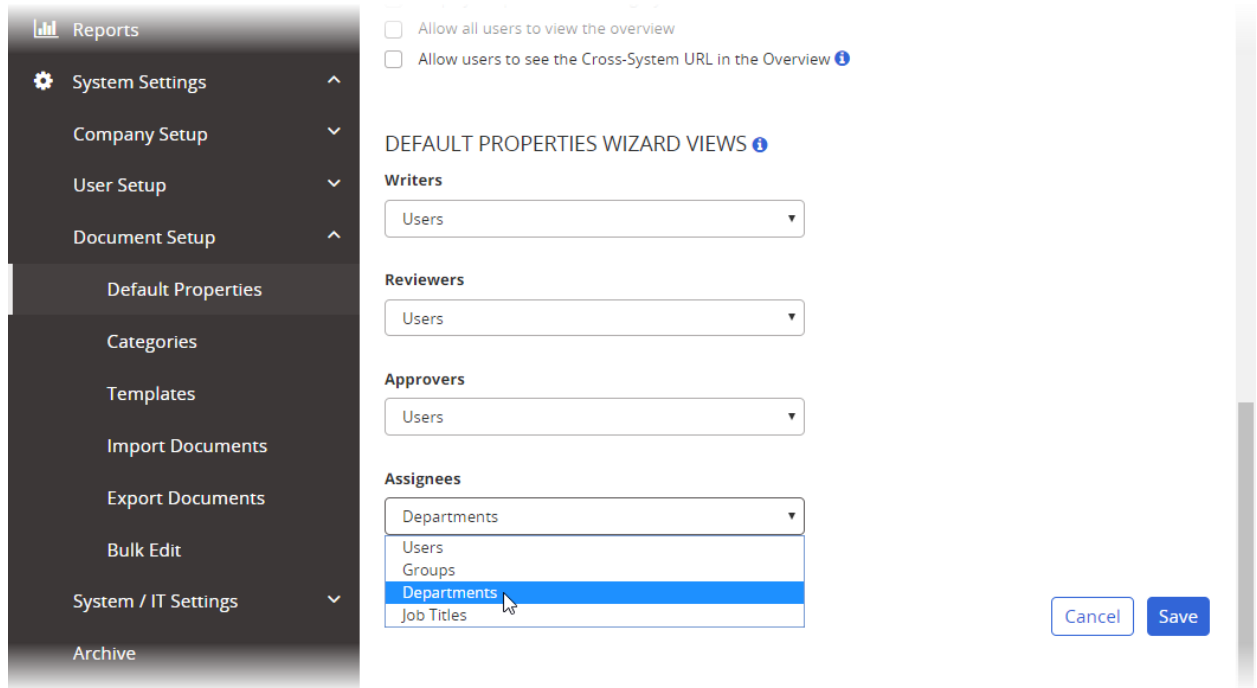
Search multiple sites. You can now make multiple site selections and search all those sites at once.
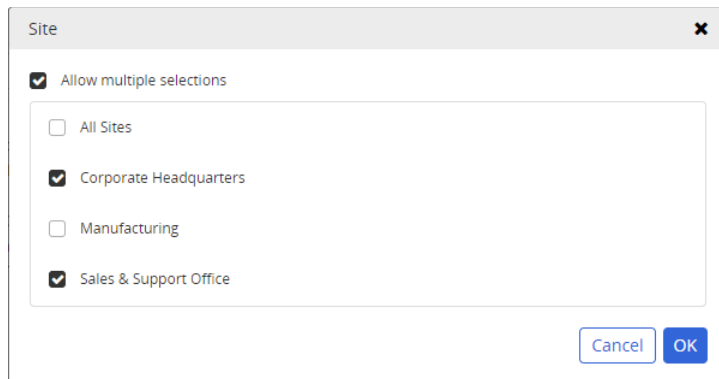
Search for departments, groups, or job titles. Previously, searching applied only to individual users. You can now search for other entities as well.
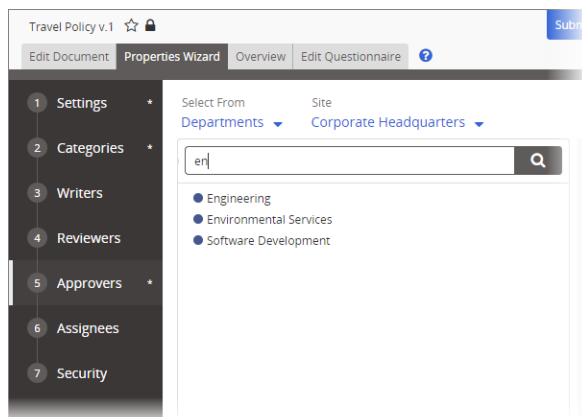
User selection count. The total number of individual users selected is now displayed.

Rearrange users in levels. When using levels, you can now drag user names from one level to another.

Other changes:
- If a level is empty, you can now click ✖ to remove the level immediately (instead of waiting for the page to reload).
- Job title groups are now included within the *Groups* option instead of being separately listed.
- The ability to delete a selected entity by double-clicking it is no longer supported.

Office Online Integration – *Now in Beta!*
In addition to being integrated with the desktop version of Microsoft® Word, PolicyTech is now integrated with Word Online. Unlike the desktop integration (WordModule*Plus*) used exclusively prior to this Beta release, these new online integrations do not require any software to be installed on users' computers.

When you open a Word document with Office Online integration enabled, the document is first displayed in preview mode. The exciting news here is that the Word document can always be displayed regardless of your computer's or device's configuration, because PolicyTech uses the always available free version of Word Online to display the document.
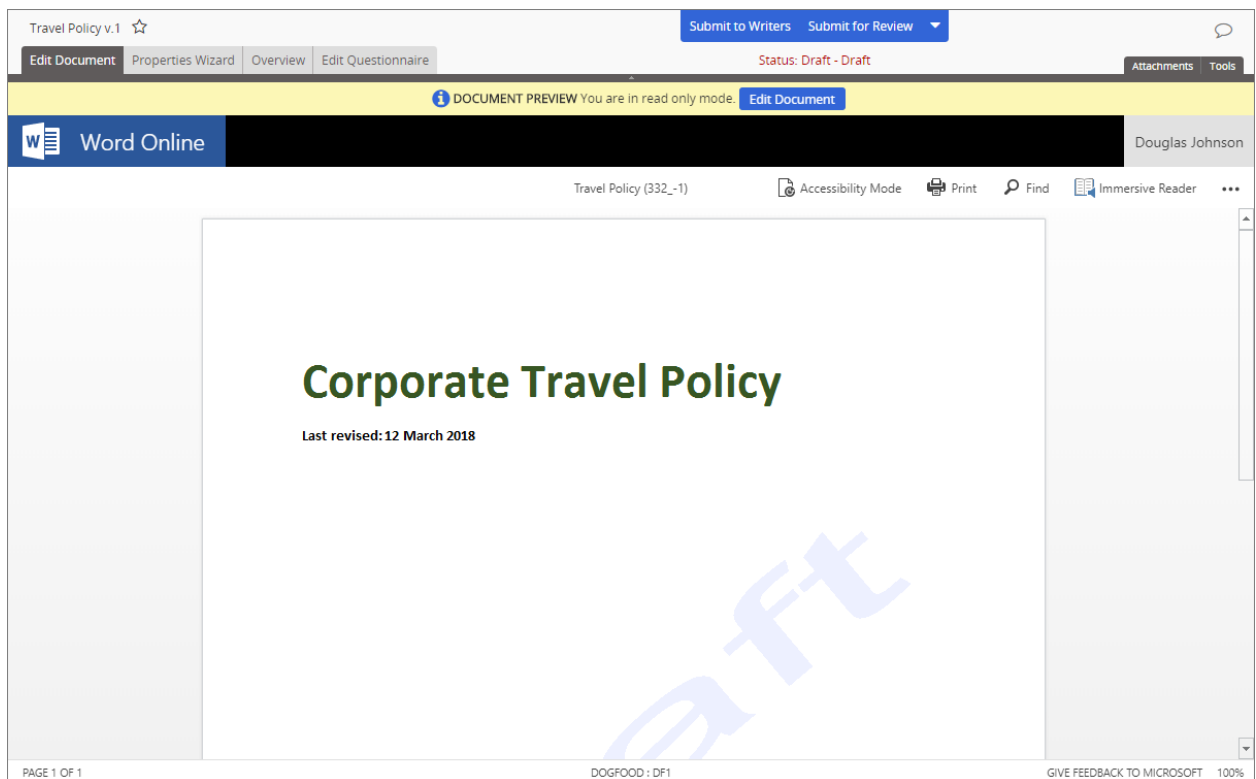
When you click the **Edit Document** button, a menu of options appears.
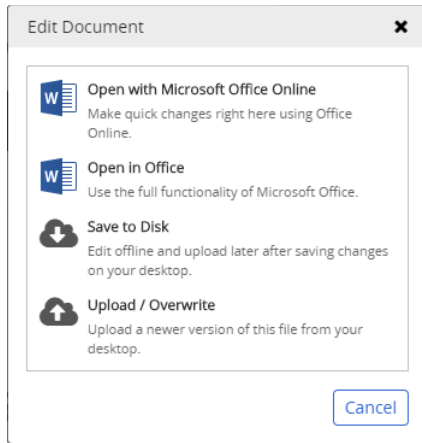
After clicking **Open with Microsoft Office Online**, PolicyTech switches to edit mode, with the document filling the entire window. Notice the **PolicyTech Tools** pane to the right of the document. Use this add-in to insert document property fields, insert links to other PolicyTech documents, and add attachments.

Note: The **PolicyTech Tools** add-in may not be initially available in the Beta version for the 13 November release. If not, it will be available shortly thereafter.
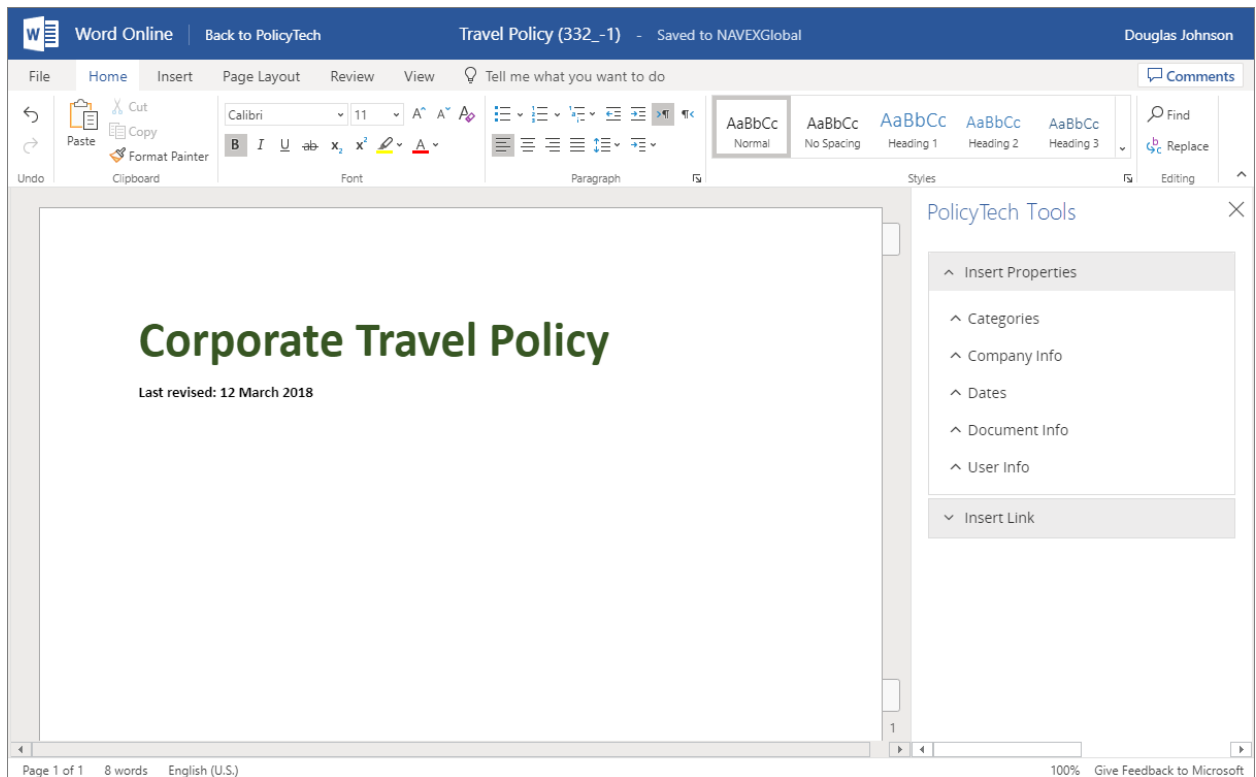
To return to the preview mode and access the **Properties Wizard** tab and other options, simply click **Back to PolicyTech**.
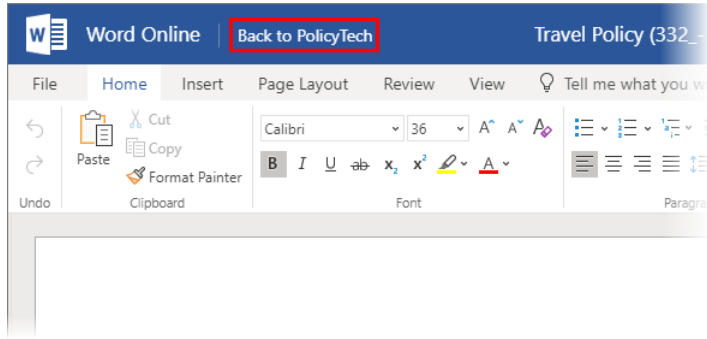
If you want to try the new Office Online integration while it is in Beta, we highly recommend you do so in a testing or training system rather than in your production system. *When you enable Office Online integration, you also disable WordModulePlus.*

Please read through the "Office Online integration FAQs" section below to decide if you want to try out the new integration. If so, please contact Customer Support to have it enabled.

Office Online integration FAQs:

Q Can some users be using the Office Online integration and others be using the legacy WordModule*Plus* integration?

A No. You must enable one or the other for your entire PolicyTech system.

Q If I enable Office Online integration, can I go back to WordModule*Plus* integration if needed?

A Yes. Disable Office Online integration to start using WordModule*Plus* again.

Q Is a specific type of Office Online subscription required for the integration to work?

A Yes and no. An Office Online subscription is not required for viewing Word documents. However, an Office 365 Business or Business Premium subscription is required to edit Word and Excel documents using PolicyTech's Office Online integration.

Q Are all the features available in the legacy WordModule*Plus* integration also available in the Office online integration.

A Many, but not all. Currently, Microsoft does not include all the same features in the online versions of their applications as in the desktop versions. Most importantly, perhaps, Word Online does not include a user interface for the Track Changes feature. While PolicyTech turns on Track Changes behind the scenes when reviewers and approvers revise a document using Word Online, the tracked changes (redlining, format change comments, and the like) will not ever be visible to the reviewers, approvers, and document owners in Word Online. To view the tracked changes, a user must open the document in the desktop version of Word. We are hopeful that Microsoft will include the Track Changes feature in a future Word Online release.

Note: Those who have used Word Online for any length of time will already be familiar with the requirement to use Word Online's **Edit in Word** command when they need to perform certain editing and formatting actions, such as adding and modifying styles or using rulers and gridlines. PolicyTech's **Open in Office** command is roughly equivalent to Word Online's **Edit in Word** command.

Q What if I want to use my desktop version of Word to edit documents?

A The new Office Online integration feature also includes the option to open your Word or Excel document in the desktop application. The only difference you will notice is that the document always opens in a separate application window instead of directly in the PolicyTech document window. Any changes you save in the Word or Excel application are automatically saved back to the PolicyTech database.

Note: This behavior of opening in a separate application window also exists with WordModule*Plus* when using the desktop version of Excel 2013 or later.

Q Can we continue to use the legacy WordModule*Plus* integration after the general release of Office Online integration?

A   Yes. Understand, however, that the WordModule*Plus* technology was built for older Microsoft applications and will progressively lose functionality as newer desktop versions of Word become available. We strongly encourage switching to the next generation Office Online/Office desktop integration once it is generally available.

Q   Can we use this next generation Word integration even if our users only use the desktop version of Microsoft Office?

A   Yes. The free version of Word Online and Excel Online will be used to view documents. Those who need to edit documents in PolicyTech will simply need to select **Open in Office** when opening a document.

Note: We have tested the next generation Office integration with the 2016 desktop version of Word. While the **Open in Office** feature may work with earlier versions, these have not been tested. Future versions will be tested and supported as Microsoft releases them.

Q   Can I still insert document property fields using Office Online integration?

A   Yes, eventually. With the PolicyTech Tools add-in (coming soon), you can insert property fields, insert links to other PolicyTech documents, and add attachments.

New Questionnaire Reports

The two previously existing questionnaire reports—*Questionnaire Results by Document* and *Questionnaire Results by User*—have been redesigned, and a third has been added—*Questionnaire Statistics*. All three reports can be used for in-document questionnaires as well as the still-in-Beta feature, stand-alone questionnaires.

The same next-generation report technology used in such reports as *Tasks by Document* and *Tasks by User* has been used to update the *Questionnaire Results by Document* and *Questionnaire Results by User* reports.

The *Questionnaire Results by Document* report includes both a *Questionnaire View* and a *Questionnaire Completion* view, as shown below.

And the *Questionnaire Results by User* report includes both a *User View* and a *User Completion View*.

Layout: User View ▼ ⋯ ✓

Data	🔧 ︿

User ▲ ✖	Title ▲ ✖	Questionnaire Version ▲ ✖	Question ▲ ✖	🔍 Find…

Response	Attempt #
︿ User: Jones, Anne (Chief Finance Officer) (2)	
⌄ Title: Conflict of Interest Survey (1)	
︿ Title: Family and Medical Leave (1)	
︿ Questionnaire Version: 1 (7)	
︿ Question: 1: How long must an employee hav…	
12 months	1
︿ Question: 2: Which of the following is not a re…	
Research leave	1
︿ Question: 3: What is the maximum amount o…	

Layout: User Completion View ▼ ⋯

Data	🔧 ︿

Completion Status ▲ ✖	User ▲ ✖	Title ▲ ✖	Questionnaire Version ▲ ✖	🔍 Find…

Question	Response	Attempt #
︿ Completion Status: Complete (1)	7	
︿ User: Jones, Anne (Chief Finance Officer) (1)	7	
︿ Title: Family and Medical Leave (1)	7	
︿ Questionnaire Version: 1 (7)	7	
1: How long must an employee have been employed befo…	12 months	1
2: Which of the following is not a recognized leave type fo…	Research leave	1
3: What is the maximum amount of time allowed for fami…	12 months	1
4: True or false: A victim of a crime can qualify for a leave.	True	1
5: If you know in advance that you will need a leave, you …	Both Human Resources and your …	1
6: If your leave was unforeseeable, you must complete a l…	14 days	1
7: True or false: All paperwork pertaining to your leave is …	False	1
︿ Completion Status: Incomplete (1)	13	
︿ User: Jones, Anne (Chief Finance Officer) (1)	7	
︿ Title: Conflict of Interest Survey (1)	7	
︿ Questionnaire Version: 1 (13)	13	
1: Please list your employer(s) or others for whom you ha…	[Incomplete]	-
2: Are you or have you been, within the past twelve (12) …	[Incomplete]	-
3: Please provide the names of such corporation, compa…	[Incomplete]	-

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The new report—***Questionnaire Statistics***—has both a ***Quiz View*** focusing on correctness percentages and a ***Survey View*** showing counts and percentages of chosen responses.

Layout: Quiz View

Data

	Title ▲ ✖	Questionnaire Version ▲ ✖	Question ▲ ✖		🔍 Find...
Answer	**Times Chosen**	**Percent Chosen**	**Answer Key**	**% Correct Answers**

Answer	Times Chosen	Percent Chosen	Answer Key	% Correct Answers
⌄ Title: Family and Medical Leave (...				86%
⌄ Questionnaire Version: 1 (7)				86%
⌄ Question: 1: How long...				75%
3 months	0	0%	Incorrect	75%
6 months	1	25%	Incorrect	75%
12 months	3	75%	Correct	75%
24 months	0	0%	Incorrect	75%
⌄ Question: 2: Which of ...				100%
Research leave	4	100%	Correct	100%
Medical leave	0	0%	Incorrect	100%
Family leave	0	0%	Incorrect	100%

Layout: Survey View

Data

| Answer	Times Chosen	Percent Chosen	Questionnaire Submissions
⌄ Title: Conflict of Interest Survey (1)			3
⌄ Questionnaire Version: 1 (13)			3
⌄ Question: 1: Please list y...			3
(Open-Ended)	3	100%	3
⌄ Question: 2: Are you or h...			3
Yes	1	33%	3
No	2	67%	3
⌄ Question: 3: Please provi...			3
(Open-Ended)	1	100%	3
⌄ Question: 4: Other than i...			3
Yes	1	33%	3
No	2	67%	3
⌄ Question: 5: Please supp...			3
(Open-Ended)	1	100%	3
⌄ Question: 6: Within the p...			3
Yes	0	0%	3
No	3	100%	3

15   30   60   Page 1 of 1 « ‹ › »

Minor User Interface Changes

You may notice several user interface changes that are intended to standardize the look and feel of all NAVEX Global products. The most prominent change is a new PolicyTech logo and the movement of the *Toggle Sidebar* icon into the logo area.
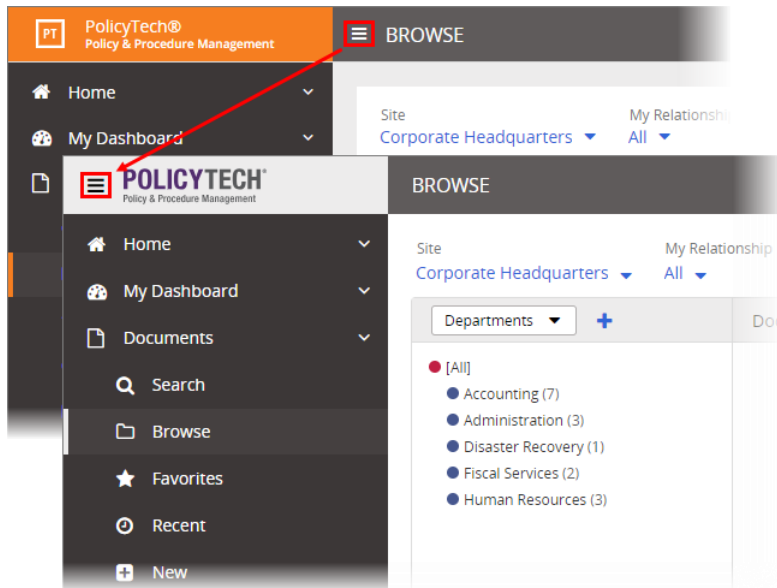
The way you control the logo area in Theme Manager has also changed slightly. In addition to the *Enable Logo Area* option, there is now an *Enable Custom Logo* option. If you were using a customized logo immediately prior to the 13 November release, the *Enable Custom Logo* option will be selected after the update. Otherwise, it will not be selected, and users will see the new PolicyTech logo.
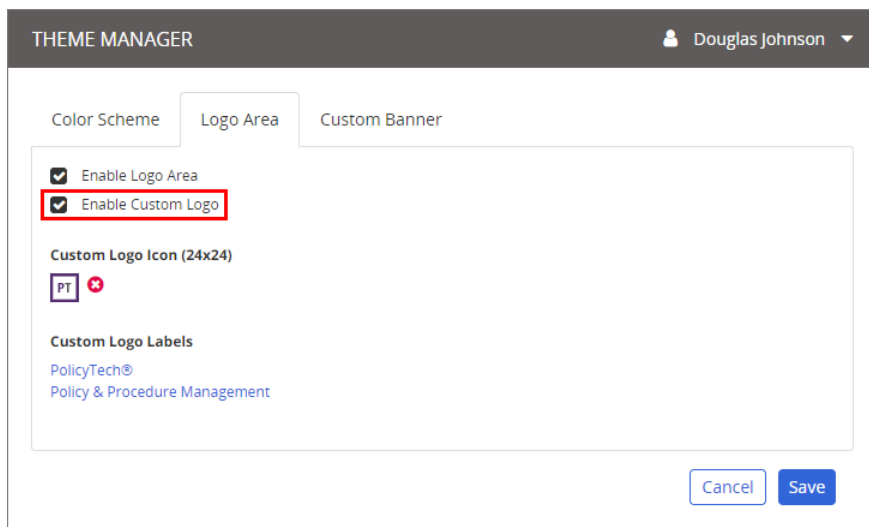
What do you need to do?

There is nothing you need to do. If you do not see changes after the release is deployed, you can clear your web browser cache as a troubleshooting step (see your web browser's help for information on how to do this).

Where do you get more information?

Administrators can access our **Customer Resource Center**, or contact NAVEX Global Customer Support for more information or assistance at **policytech@navexglobal.com**.