

PolicyTech Policy and Procedure Management
Reports Supplement



PolicyTech® 10.6 Reports Supplement

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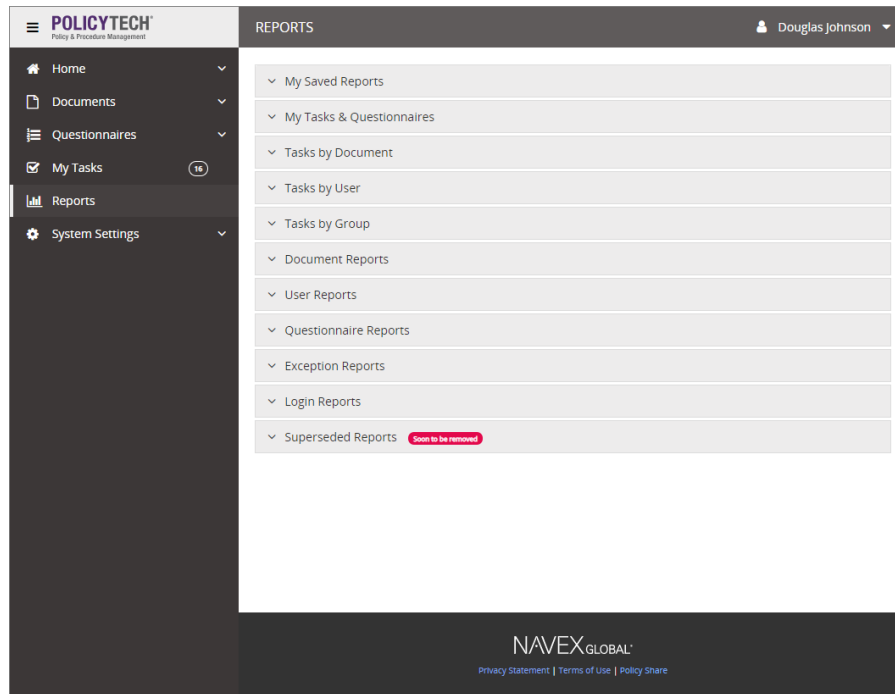
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Introduction to Reports

PolicyTech includes many reports that let you check the status of and view statistics about documents, questionnaires, and users. To access reports, in the main PolicyTech window, click **Reports**.



The reports you have access to are dependent on the roles and system permissions you've been assigned, so your **Reports** menu may look different than the one shown above (see [Report Access by Role and Permission](#) for details).

Report Access by Role and Permission

The tables below show the reports a user has access to by virtue of role and system permission assignments.

Access to My Tasks & Questionnaires Reports

Report	Document Roles with Access	System Permissions with Access
Questionnaire Results	all	all
Questionnaire Certificates	all	all
Document Owner—Periodic Review Tasks	Document Owner	none
My Tasks	all	all

Access to Tasks by Document Reports

Report	Document Roles with Access	System Permissions with Access
Tasks by Document - Current	Document Owner Proxy Author	Administrator Report Manager
Tasks by Document - All Tasks	Document Owner Proxy Author	Administrator Report Manager
Documents Due for Periodic Review	Document Owner Proxy Author	Administrator Report Manager
Documents with Links to Update	Document Owner Proxy Author	Administrator Report Manager

Access to Tasks by User Reports

Report	Document Roles with Access	System Permissions with Access
Tasks by User - Current	Manager	Administrator Report Manager
Tasks by User - All	Manager	Administrator

Tasks		Report Manager
Document Owner - Periodic Review Tasks	Manager	Administrator Report Manager
Document Owner - Links to Update	Manager	Administrator Report Manager

Access to Tasks by Group Reports

Report	Document Roles with Access	System Permissions with Access
Writer Groups	Manager	Administrator Report Manager
Reviewer Groups	Manager	Administrator Report Manager
Approver Groups	Manager	Administrator Report Manager
Reader Groups	Manager	Administrator Report Manager

Access to Document Reports

Report	Document Roles with Access	System Permissions with Access
Document Assignments by Title	Document Owner Proxy Author	Administrator Report Manager
Document Count by Owner	Document Owner Proxy Author	Administrator Report Manager
Documents Accessed	Document Owner Proxy Author	Administrator Report Manager
Document Duration in Workflow	Document Owner Proxy Author	Administrator Report Manager
Linked Documents	Document Owner Proxy Author	Administrator Report Manager
Documents within Date Range	Document Owner Proxy Author	Administrator Report Manager

Documents Approved as of a Specific Date	Document Owner Proxy Author	Administrator Report Manager
Change Summary with Version History and Documents Replaced	Document Owner Proxy Author	Administrator Report Manager
Print Multiple Documents	Document Owner Proxy Author	Administrator Report Manager
Email Bounce Backs by Document	Document Owner Proxy Author	Administrator Report Manager

Access to User Reports

Report	Document Roles with Access	System Permissions with Access
Document Assignments by User	Manager	Administrator Report Manager
Documents Accessed by User	Manager	Administrator Report Manager
Users Canceled Mark as Read	Manager	Administrator Report Manager
User Permissions	none	Administrator Company/User Report Manager
Users with Bounce Back Emails	none	Administrator Report Manager
Dedicated Licenses	none	Administrator

Access to Questionnaire Reports

Report	Document Roles with Access	System Permissions with Access
Questionnaire Results by Document	Document Owner	Administrator Report Manager
Questionnaire Results by User	Manager	Administrator Report Manager

Questionnaire Statistics	Document Owner	Administrator Report Manager
--------------------------	----------------	---------------------------------

Access to Exception Reports

Report	Document Roles with Access	System Permissions with Access
Exceptions by Document	none	Administrator Report Manager

Access to Login Reports

Report	Document Roles with Access	System Permissions with Access
Failed Logins Due to Insufficient Licenses	none	Administrator System/IT
Users Currently Logged In	none	Administrator System/IT

Access to Superseded Reports

Report	Document Roles with Access	System Permissions with Access
Writer Tasks (My Tasks & Questionnaires)	Writer	none
Reviewer Tasks (My Tasks & Questionnaires)	Reviewer	none
Approver Tasks (My Tasks & Questionnaires)	Approver	none
Reader Tasks (My Tasks & Questionnaires)	Reader	none
All Workflow Tasks (My Tasks & Questionnaires)	all	all

In Draft (Tasks by Document)	Document Owner Proxy Author	Administrator Report Manager
In Collaboration (Tasks by Document)	Document Owner Proxy Author	Administrator Report Manager
In Review (Tasks by Document)	Document Owner Proxy Author	Administrator Report Manager
In Approval (Tasks by Document)	Document Owner Proxy Author	Administrator Report Manager
In Published (Tasks by Document)	Document Owner Proxy Author	Administrator Report Manager
All Workflow Statuses (Tasks by Document)	Document Owner Proxy Author	Administrator Report Manager
Writer Tasks (Tasks by User)	Manager	Administrator Report Manager
Reviewer Tasks (Tasks by User)	Manager	Administrator Report Manager
Approver Tasks (Tasks by User)	Manager	Administrator Report Manager
Reader Tasks (Tasks by User)	Manager	Administrator Report Manager
Document Owner - Resubmit for Review Tasks (Tasks by User)	Manager	Administrator Report Manager
All Workflow Tasks (Tasks by User)	Manager	Administrator Report Manager
Questionnaire Results by Document (Questionnaire Reports)	Document Owner	Administrator Report Manager
Questionnaire Results by User (Questionnaire Reports)	Manager	Administrator Report Manager

My Tasks & Questionnaires Reports

The **My Tasks & Questionnaires** category includes the following reports:

[Report: Questionnaire Results](#)

[Report: Questionnaire Certificates](#)

[Report: Document Owner - Periodic Review Tasks](#)

[My Tasks](#)

Report: Questionnaire Results (Personal)

Description


Shows the overall and individual question results for all questionnaires you completed when you marked documents as read, as well as results (if any) of stand-alone questionnaires (those not attached to documents) that you completed. The results are organized by document/questionnaire.

Available to users with the following roles or permissions:

All users with any assigned role or system permission

Sample Report:

Questionnaire Results by User

NAVEX Global powered by  policytech

Pages: 2 Generated By: Tawna Gifford Generated: 10/30/2014 08:00

Questionnaire Results by User

1. **Gifford, Tawna (Accounts Receivable Clerk)** Site: Corporate Headquarters
Department: Accounting

Questionnaire Attempts (1)

1. [Family and Medical Leave \(v.1\)](#)

Ref. #	Date/Time Taken	Score	Attempt #
331	10/30/2014 07:57	86	1

Objective: Understand the different types of leave and the eligibility rules.

- How long must an employee have been employed before being eligible for leave?

Answer Chosen: ✔ 12 months
- Which of the following is not a recognized leave type for our company?

Answer Chosen: ✔ Research leave
- What is the maximum amount of time allowed for pregnancy leave?

Answer Chosen: ✔ 12 weeks

Objective: Understand how to apply for a leave.

- True or false: A victim of a crime can qualify for a leave.

Answer Chosen: ✔ True
- If you know in advance that you will need a leave, you must contact:

Answer Chosen: ✔ Both Human Resources and your manager
- If your leave was unforeseeable, you must complete a leave request form within how many days from the start of your leave?

Answer Chosen: ✖ 21
- True or false: All paperwork pertaining to your leave is placed in your personnel file.

Answer Chosen: ✔ False

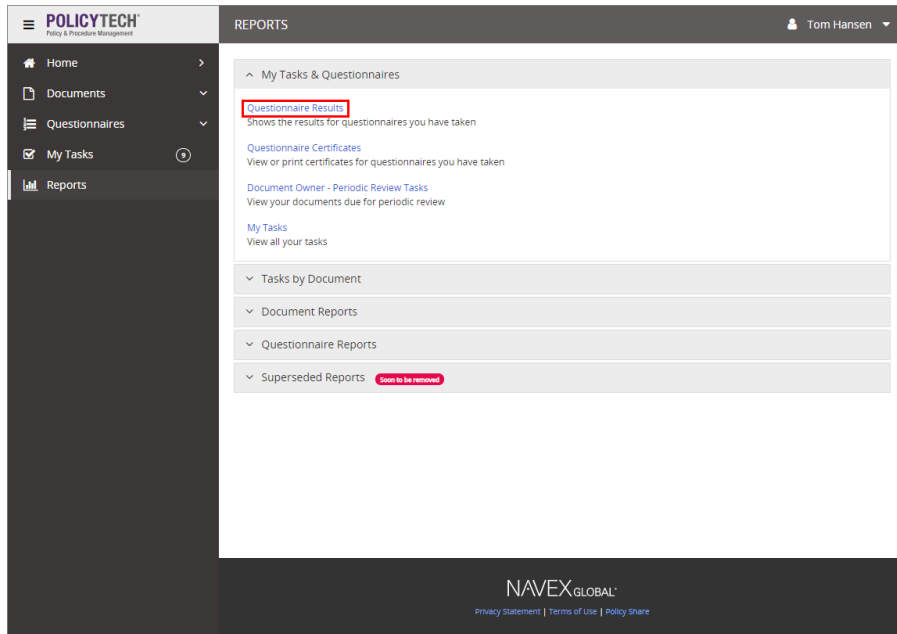
2. [Family and Medical Leave \(v.1\)](#)

Ref. #	Date/Time Taken	Score	Attempt #
331	10/30/2014 08:00	86	1

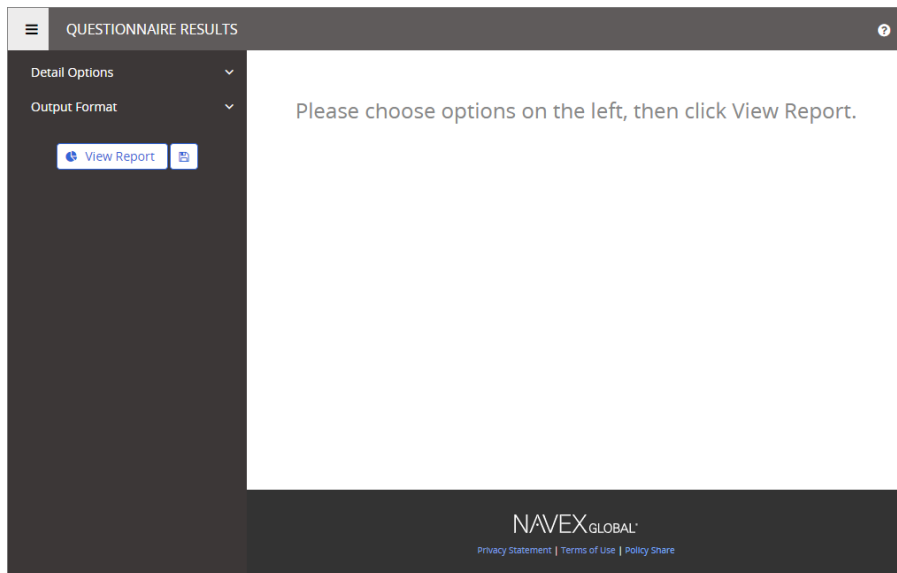
1/2

How to Generate

- Click **Reports**.
- Click **My Tasks & Questionnaires**, and then click **Questionnaire Results**.



All options available for this report are displayed on the left.





3. (Optional) Click **Detail Options**, and then select any of the following:

Detail Options ^

☒ Include Questionnaire Details

☐ Include Archived Documents

Output Format v

- **Include Questionnaire Details:** Include details about each questionnaire question.

2. Family and Medical Leave (v.1)				
Ref. #	Date/Time Taken	Score	Attempt #	
295	04/12/2013 11:27 AM	100	1	

Objective: Understand the different type of leave and eligibility rules.

1. How long must an employee have been employed before being eligible for leave?

Answer Chosen: 12 months

2. Which of the following is not a recognized leave type for our company?

Answer Chosen: Research leave

3. What is the maximum amount of time allowed for pregnancy leave?

Answer Chosen: 12 weeks

Objective: Understand how to apply for a leave.

4. True or false: A victim of a crime can qualify for a leave.

Answer Chosen: True

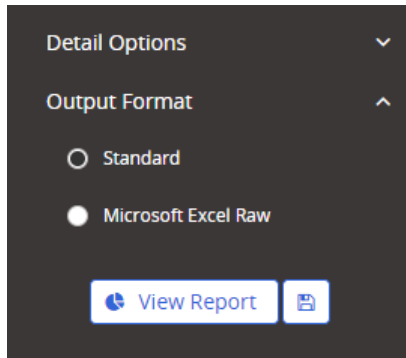
5. If you know you will need a leave, you must contact:


Answer Chosen: Both human resources and your manager

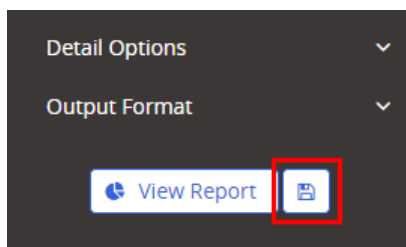
6. If your leave was unforeseeable, you must complete a leave request form within how many days from the start of your leave?

Answer Chosen: 15

- **Include Archived Documents:** Includes all archived documents with questionnaires and all archived stand-alone questionnaires.
4. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.



5. (Optional) To save the current settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

6. 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.

QUESTIONNAIRE RESULTS

Page 1 of 3

Save As PDF

Questionnaire Results by User

NAVEX Global powered by policyarch

Pages: 3 Generated By: Tom Hansen Generated: 10/30/2018 2:16 PM

Questionnaire Results by User

1. Hansen, Tom (Accounting Manager) Site: Corporate Headquarters Department: Accounting

Questionnaire Attempts (2)

1. Conflict of Interest Survey (v.1)

Ref. #	Questionnaire Version	Date/Time Taken	Attempt #
298	1	09/26/2018 3:03 PM	1

Section: General Questions

1. Please list your employer(s) or others for whom you have provided goods or services within the past three (3) months. (List only those who contribute 25% or more of your total yearly income.)

Answer Chosen: NAVEX Global

2. Are you or have you been, within the past twelve (12) months, a member of the Board of Directors, an officer, or principal of any corporation, company, association, institution, or other business?

Answer Chosen: ☒ No

3. Other than incidental ownership, do you, or does any member of your immediate family, have a direct or indirect ownership or other financial interest in any corporation, company, institution, or other business? ("Incidental ownership" means less than 10% ownership of the

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	Unique ID	First N	Mid Last Na	Job Titl	Site	Depar	Ref	Title (Version)	Vers	Ques	Date/Time Taken	Score	Obj	Attempt #	Question ID	Question	Answer ID	Answ	Correct?	
2	djohnson	Dougla M.	Johnsor	Chief E	Corpi	Admir	253	Vacation Policy	2	1	08/29/2011 17:05	100%	1	1	7	How many	13	10	Yes	
3	djohnson	Dougla M.	Johnsor	Chief E	Corpi	Admir	253	Vacation Policy	2	1	08/29/2011 17:05	100%	1	1	10	When mar	19	After	Yes	
4	djohnson	Dougla M.	Johnsor	Chief E	Corpi	Admir	253	Vacation Policy	2	1	08/29/2011 17:05	100%	1	1	11	An employ	22	y	No	

Report: Questionnaire Certificates (Personal)

Description

Lets you view and print certificates for all questionnaires—both document questionnaires and stand-alone questionnaires—you've passed.

Note: For a certificate to be available for a questionnaire, the document owner who created the questionnaire must have enabled the certificate option in the questionnaire settings.

Available to users with the following roles or permissions:

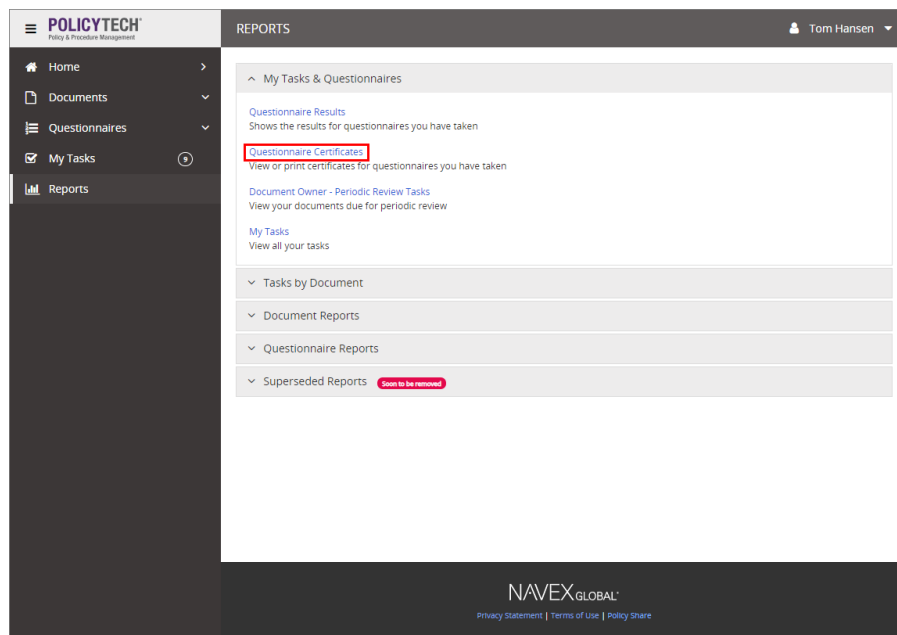
All users with any assigned role or system permission

Sample Report:

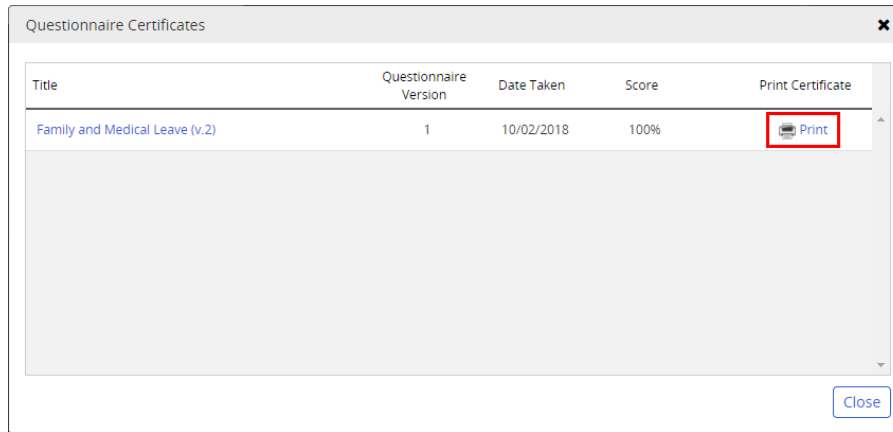


How to Generate

1. Click **Reports**.
2. Click **My Tasks & Questionnaires**, and then click **Questionnaire Certificates**.



3. (Optional) Click **Print** for one of the listed documents or questionnaires.



The certificate is displayed in a separate browser window where you can save or print it.



Report: Document Owner - Periodic Review Tasks (Personal)

Description

Shows the status of your periodic review tasks. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:

Document owner

Sample Report:

Documents Due for Review by Owner

NAVEX Global All Dates powered by policytech

Pages: 1 Generated By: Tom Hansen 10/29/2014 15:16

Summary

Overdue	Due within 1 Month(s)	Complete
2	0	N/A

Review Status by User

Legend ■ Overdue ■ Due within 1 Month(s) ■ Not Overdue

1. Hansen, Tom (Accounting Manager)	Site: Corporate Headquarters	Department: Accounting
Overview Owned (27) Overdue (2) Due within 1 Month(s) (0)		

Incomplete Tasks

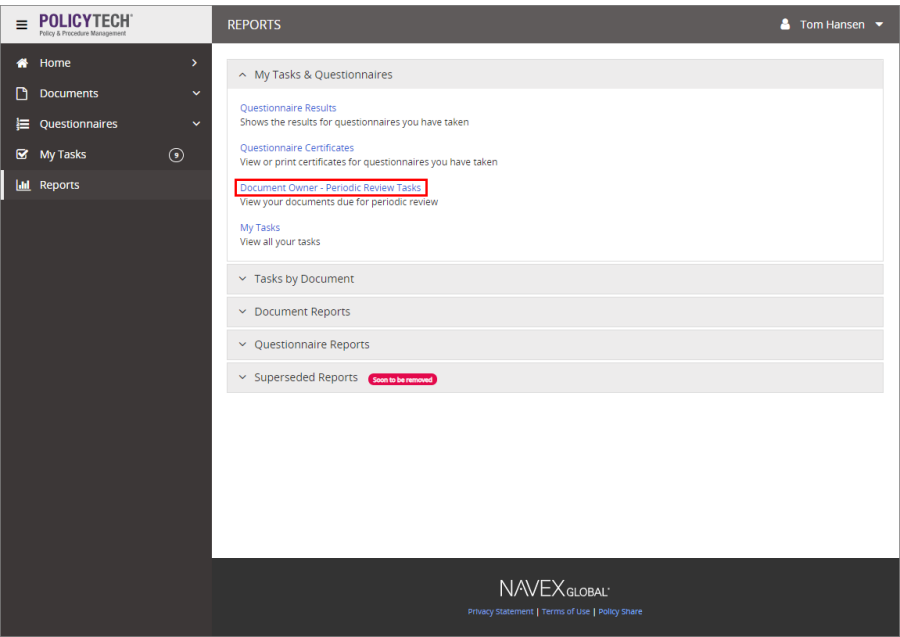
	<u>Days Remaining</u>	<u>Action</u>	<u>Date/Time</u>	<u>Ref. #</u>	<u>Title (Version)</u>	<u>In Progress Status</u>	<u>Due Date</u>
1.	(-12)	Waiting	N/A	2	Accounts Payable and Cash Distribution (v.1)		06/30/2014
2.	(-9)	Waiting	N/A	3	Bad NSF Checks (v.1)		03/04/2012

1/1

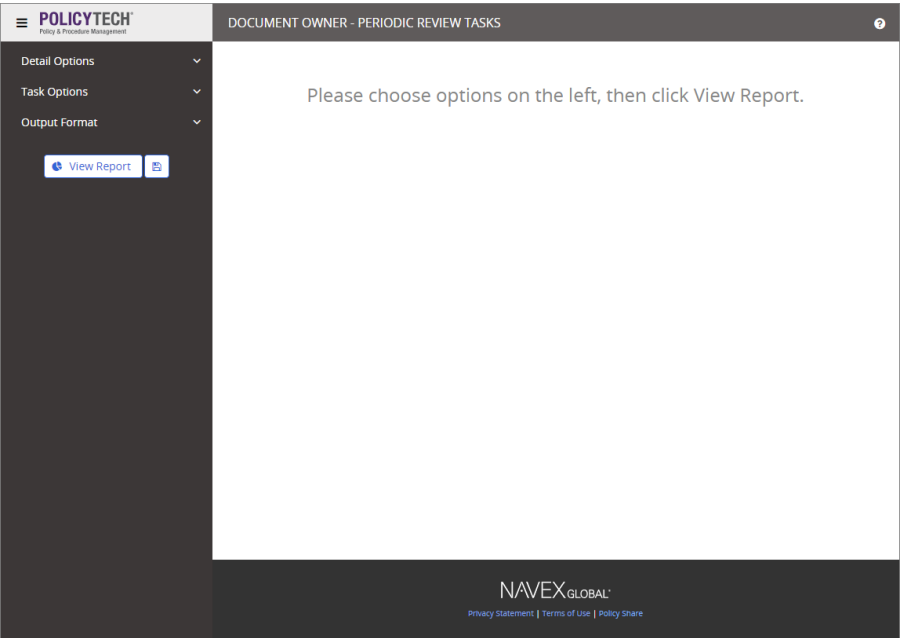
How to Generate

1. Click **Reports**.
2. Click **My Tasks & Questionnaires**, and then click **Document Owner - Periodic Review Tasks**.

Note: You will only see the task reports for the roles you've been assigned.



All options available for this report are displayed on the left.



3. (Optional) Click **Detail Options**, and then select any of the following:

Detail Options ^

☒ Include Document Details
 ☐ Include Graphs
 ☐ Include Due Dates

Task Options v

Output Format v

View Report

- **Include Document Details:** Shows the tasks associated with each document or questionnaire in the report.

1. Hansen, Tom (Accounting Manager)

Site: Corporate Headquarters

Department: Accounting

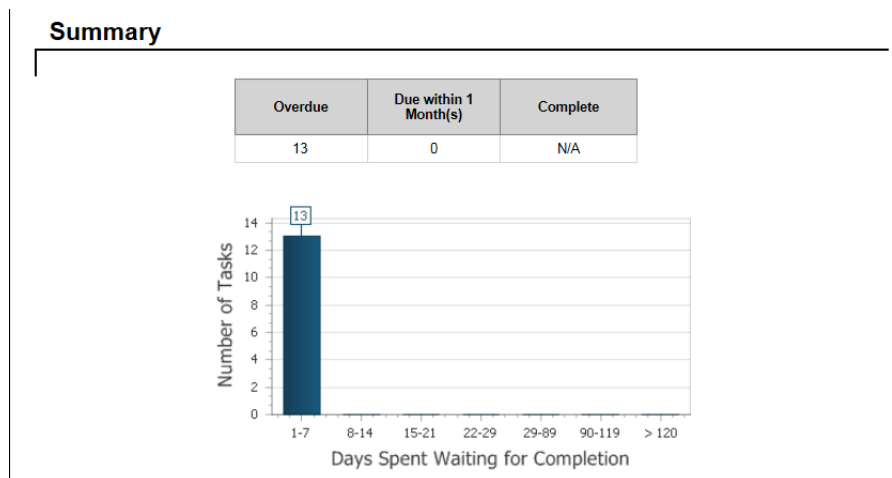
Overview

Owned (27)
Overdue (2)
Due within 1 Month(s) (0)

Incomplete Tasks

	<u>Days Remaining</u>	<u>Action</u>	<u>Date/Time</u>	<u>Ref. #</u>	<u>Title (Version)</u>	<u>In Progress</u>	<u>Status</u>	<u>Due Date</u>
1.	25	Waiting	N/A	2	Accounts Payable and Cash Distribution (v.1)			11/30/2014
2.	42	Waiting	N/A	3	Bad NSF Checks (v.1)			09/24/2014

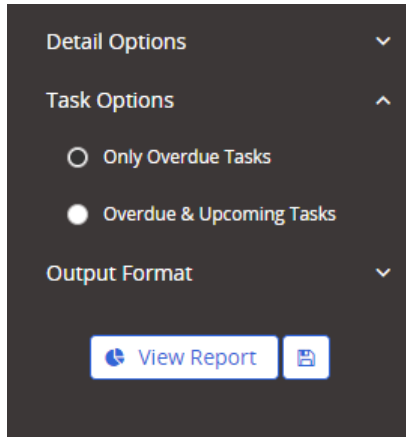
- **Include Graphs:** Adds a graph to the report's **Summary** area.



- **Include Due Dates:** Adds a **Due Date** column to the task details.

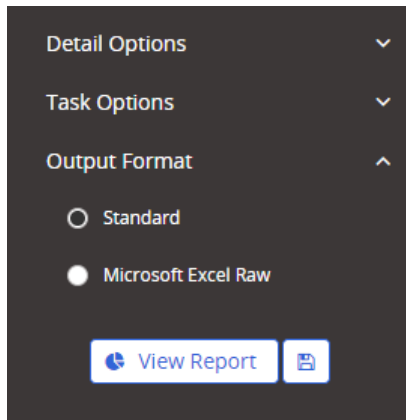
Important: This option applies only if the **Include Document Details** option is selected.

4. (Optional) Click **Task Options**, and then click **Only Overdue Tasks** or **Overdue & Upcoming Tasks**.




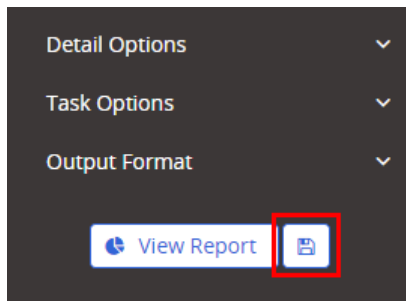
A dark-themed sidebar menu with three expandable sections: 'Detail Options', 'Task Options', and 'Output Format'. The 'Task Options' section is expanded, showing two radio button options: 'Only Overdue Tasks' (unselected) and 'Overdue & Upcoming Tasks' (selected). Below these options are two buttons: 'View Report' with a pie chart icon and a save icon.

5. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.



A dark-themed sidebar menu with three expandable sections: 'Detail Options', 'Task Options', and 'Output Format'. The 'Output Format' section is expanded, showing two radio button options: 'Standard' (unselected) and 'Microsoft Excel Raw' (selected). Below these options are two buttons: 'View Report' with a pie chart icon and a save icon.

6. (Optional) To save the current settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



A dark-themed sidebar menu with three expandable sections: 'Detail Options', 'Task Options', and 'Output Format'. At the bottom are two buttons: 'View Report' with a pie chart icon and a save icon. The save icon is highlighted with a red rectangular box.

Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

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.

Document Owner Tasks - Overdue Tasks

NAVEX Global All Dates powered by policytech

Pages: 1 Generated By: Hansen, Tom Generated: 06/01/2016 09:10

Summary

Overdue	Due within 1 Month(s)	Complete
1	N/A	0

Users with Tasks

Legend: ■ Overdue ■ Due within 1 Month(s) ■ Not Overdue

1. Hansen, Tom (Accounting Manager) Site: Corporate Headquarters Department: Accounting

Overdue Tasks (1)

Days Remaining	Action	Ref. #	Title (Version)	In Progress Status	Due Date
1. (-17)	Waiting	2	Accounts Payable and Cash Distribution (v.1)		09/02/2016

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Site	Department	User	Job Title	Incomplete	Total Tasks	Over 30 Days	Action	Date/Time	Ref. #	Title (Version)	
2	Corporate Headquarters	Human Resources	Darren Breen	Personnel Manager	4	10	0	Waiting	N/A	5	Capitalization (v.1)	
3	Corporate Headquarters	Human Resources	Darren Breen	Personnel Manager	4	10	0	Waiting	N/A	11	Fixed Asset Control (v.1)	
4	Corporate Headquarters	Human Resources	Darren Breen	Personnel Manager	4	10	0	Waiting	N/A	12	Invoice Billings (v.1)	
5	Corporate Headquarters	Human Resources	Darren Breen	Personnel Manager	4	10	0	Waiting	N/A	19	Performance Evaluation - Accounts Payable Clerk	

Report: My Tasks

Important: This is one of several next-generation, dynamic grid reports that are fundamentally different than other PolicyTech reports you may have worked with (legacy reports). In legacy reports, all report customization and manipulation is done using report settings, with the report results generated as a static document. In next-generation reports, you set a minimum of report options—such as selecting the documents and users to include—to create report results in the form of an initial framework. The initial report results consist of a Summary section and a Data section, each of which is highly customizable to create precisely the data representation you need.

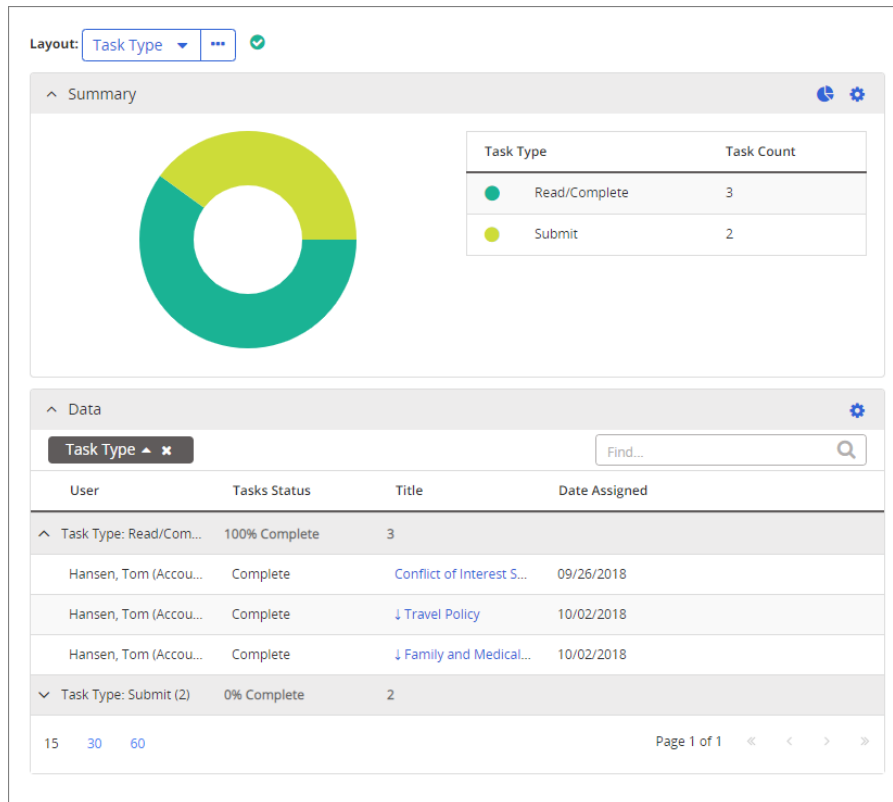
Description

Shows information about your assigned tasks. You can choose to include incomplete and complete tasks as well tasks in upcoming levels.

Available to users with the following roles or permissions:

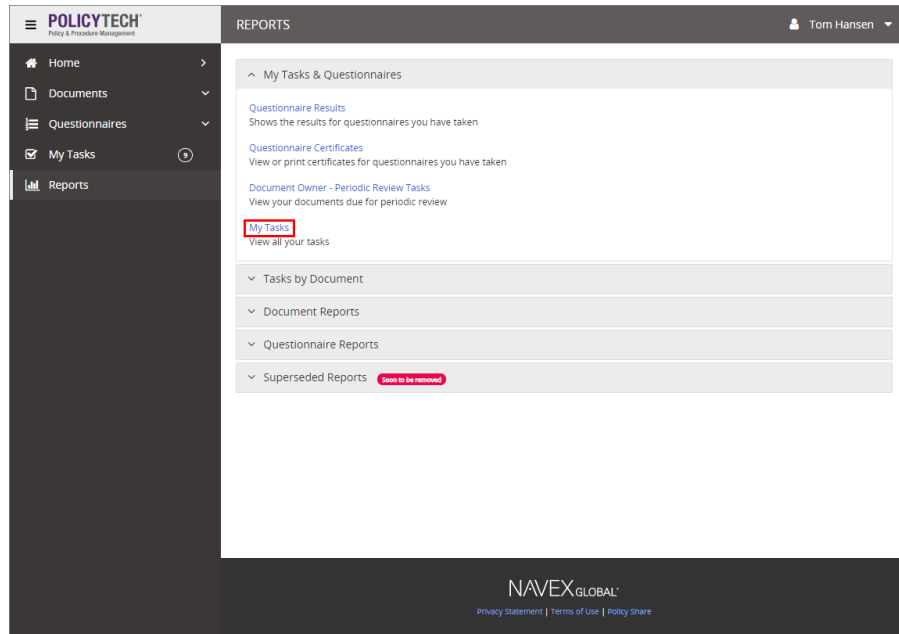
All users with any assigned role or system permission.

Sample Report:

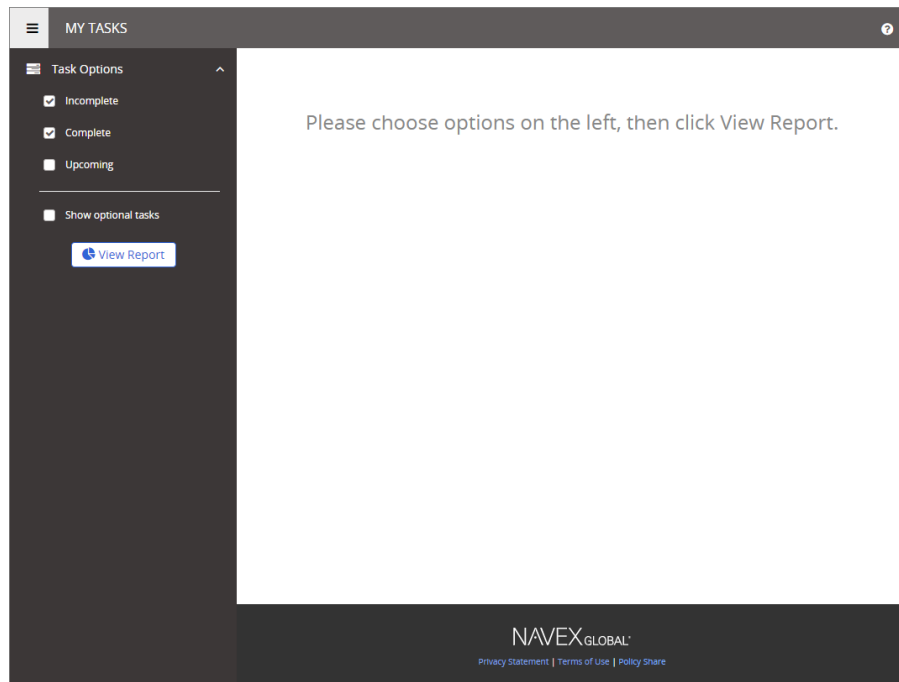


How to Generate

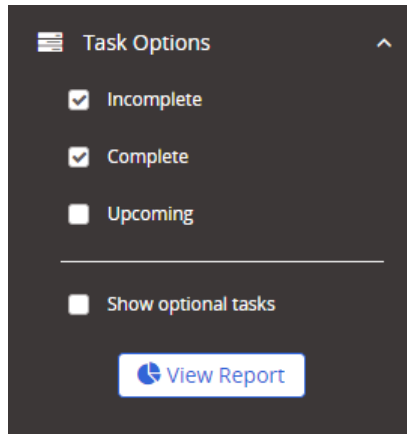
1. Click **Reports**.
2. Click **My Tasks & Questionnaires**, and then click **My Tasks**.



Task options available for this report are displayed on the left.



3. (Optional) Under **Task Options**, **Incomplete** and **Complete** are selected by default.



Select **Upcoming** to include information about your assigned tasks in a subsequent level in an active workflow status. For example, if a document to which you're assigned has three approval levels and is currently in level 1 of the Approval status, selecting **Upcoming** would also include information about your tasks assigned to approval level 2 or 3.

Select **Show optional tasks** to include information about complete, optional reading tasks, where you marked documents as read even though you were not assigned reading tasks for those documents.

4. Click **View Report**.

Note: You can also click **View Report** at any time while setting report options. After changing an option, remember to click **View Report** again to refresh the report contents.

5. Choose a report layout ([see Working with Report Layouts](#)).
6. Choose how you want information in the **Summary** pane displayed ([Working with the Summary Pane](#)).
7. Customize the **Data** grid to show only the data you need in the way you want it represented ([Working with the Data Pane](#)).
8. (Optional) Print or save the current report results (see [Printing or Saving Report Results](#)).

Tasks by Document Reports

The **Tasks by Document** category includes the following reports:

[Tasks by Document - Current](#)

[Tasks by Document - All Tasks](#)

[Documents Due for Periodic Review](#)

[Documents with Links to Update](#)

Report: Tasks by Document - Current

Important: This is one of several next-generation, dynamic grid reports that are fundamentally different than other PolicyTech reports you may have worked with (legacy reports). In legacy reports, all report customization and manipulation is done using report settings, with the report results generated as a static document. In next-generation reports, you set a minimum of report options—such as selecting the documents and users to include—to create report results in the form of an initial framework. The initial report results consist of a Summary section and a Data section, each of which is highly customizable to create precisely the data representation you need.

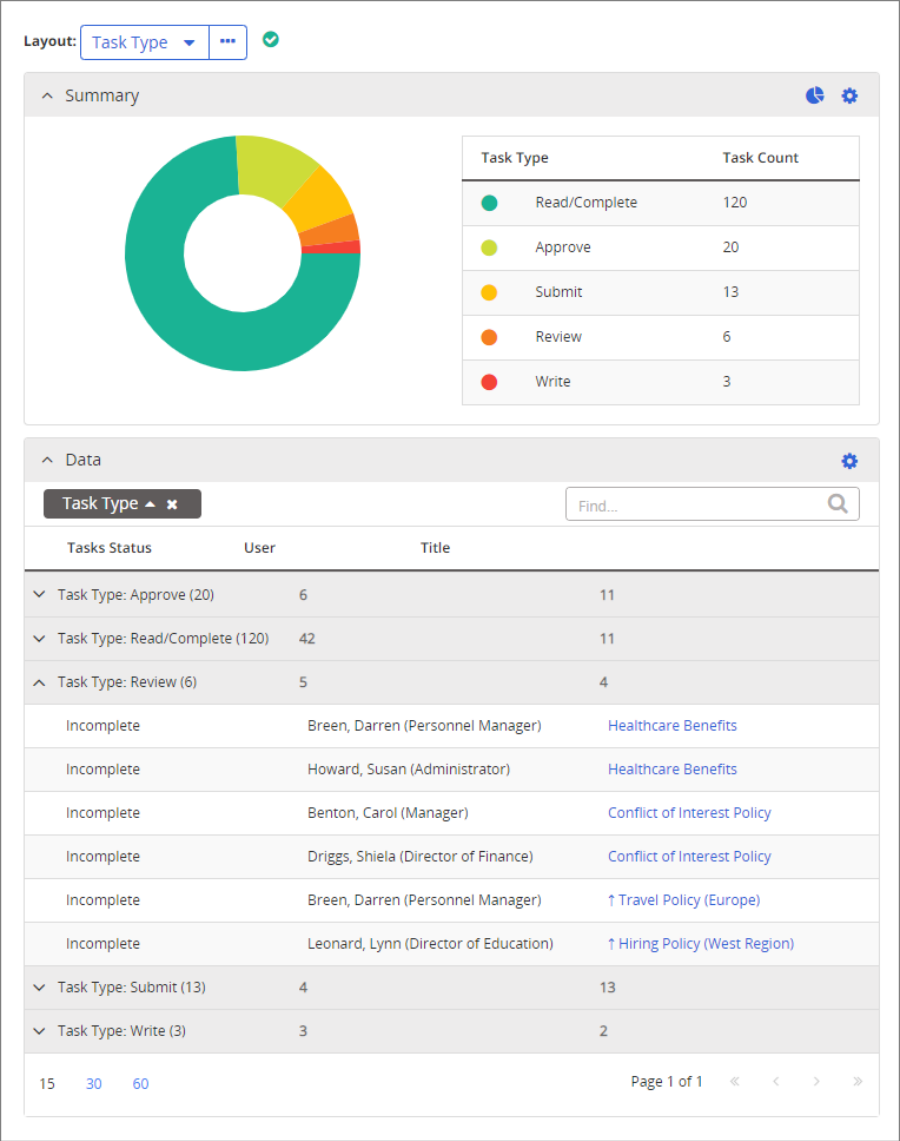
Description

Shows information about tasks in the selected documents' or questionnaires' current workflow status. For example, if a selected document is currently in the Approval status, the report would include information about that document's approver tasks. You can choose to include incomplete and complete tasks as well tasks in upcoming levels.

Available to users with the following roles or permissions:

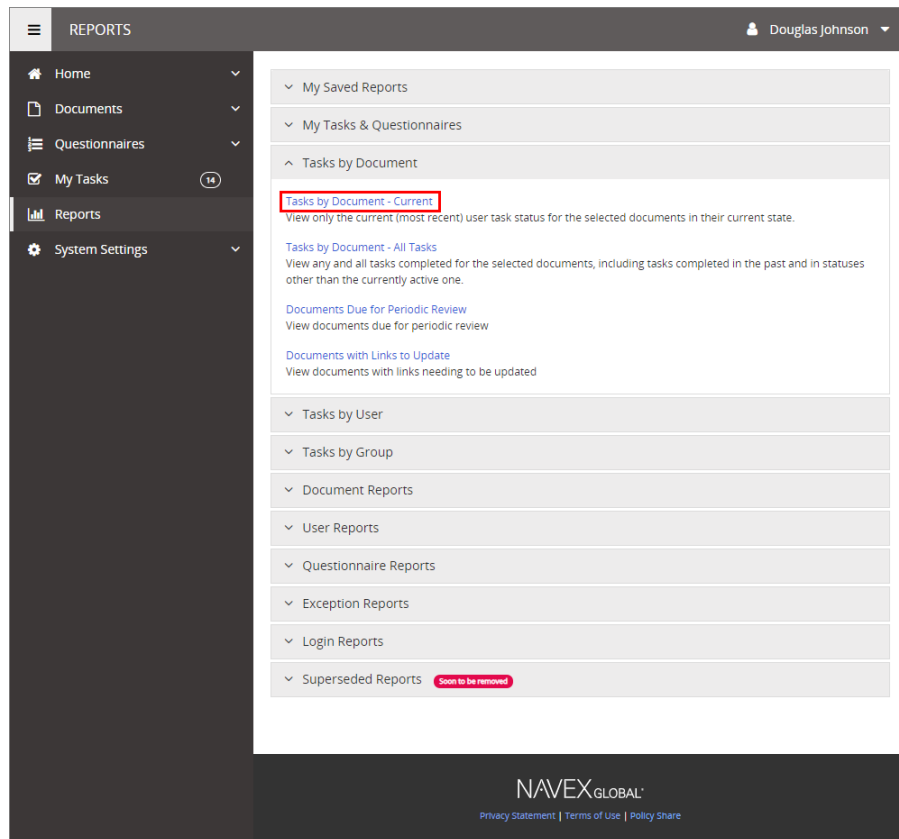
Manager, Report Manager, Administrator

Sample Report:



How to Generate

- 1. Click **Reports**.
- 2. Click **Tasks by Document**, and then click **Tasks by Document - Current**.

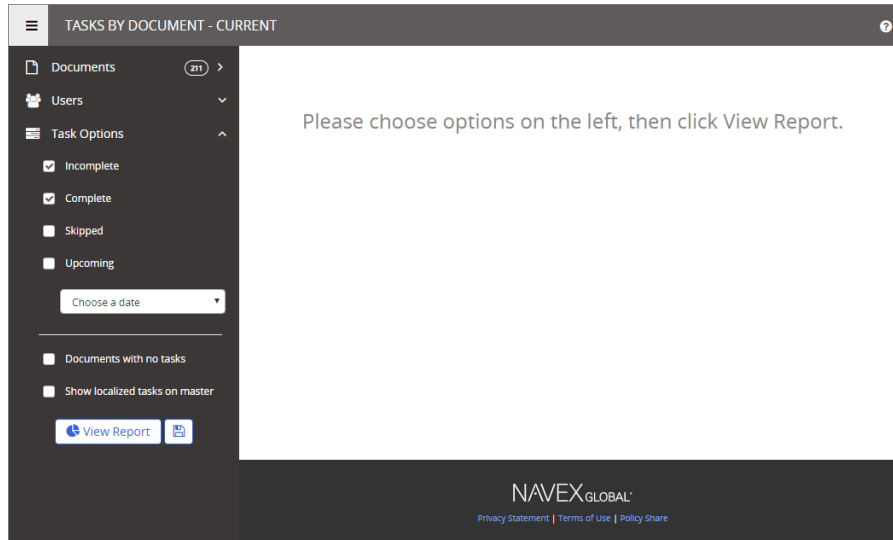


3. Select documents or questionnaires to include in the report (see [Selecting Documents](#) for help), and then click **OK**.

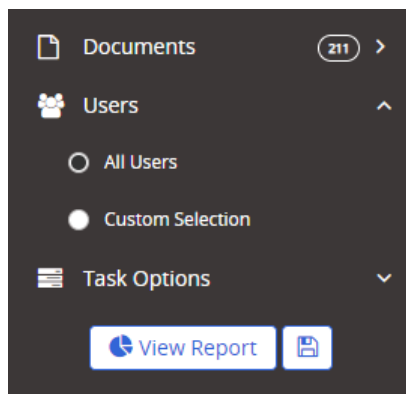
Initial options available for this report are displayed on the left. Notice that the number of currently selected documents or questionnaires is displayed

after the **Documents** option, which you can click anytime to change your document/questionnaire selection.

Note: If you change your document/questionnaire selection after clicking **View Report**, click **View Report** again to refresh the report contents.

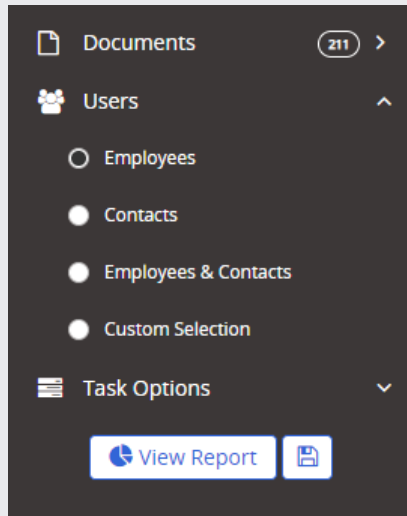


4. (Optional) You have the option to limit the documents/questionnaires included in the report to only those with tasks assigned to specific users. Click **Users**, click **Custom Selection**, and then select users in the same way as you would for a user-based report (see [Selecting Users](#) for help).

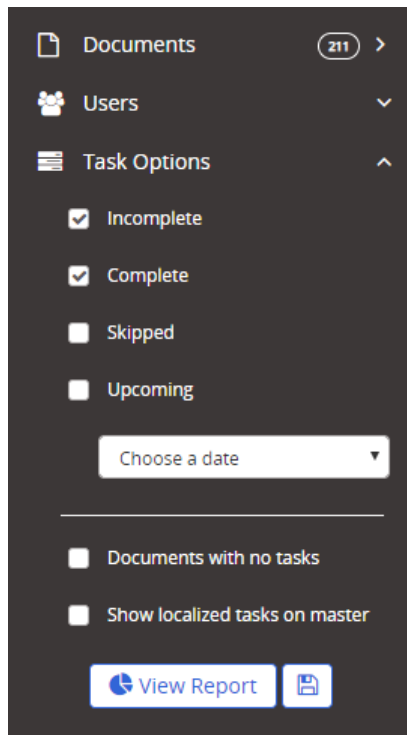


Note: If you see the options shown below, then your organization has enabled the Third-Party Accounts Module. The **Employees** option is selected by default, meaning that only those documents/questionnaires assigned to regular PolicyTech users and not third-party contacts are included in the report. In addition to the **Employees** and **Custom Selection** options, you can choose **Contacts** to limit included documents/questionnaires to only those assigned to third-party contacts, or choose the **Employees & Contacts** option to include all

documents/questionnaires, regardless of the types of users assigned.

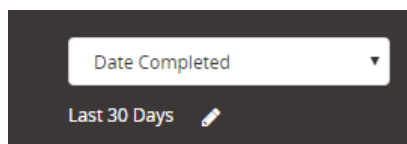



5. (Optional) Under **Task Options**, **Incomplete** and **Complete** are selected by default, meaning that only those of the currently selected documents/questionnaires that include incomplete or complete tasks for the documents'/questionnaires' current task statuses will be included in the report results. For example, if a selected document is currently published and has at least one assignee designated, that document's information will be included in the report whether the assignees have marked the document as read or not. If a selected published document has no assignees designated, that document's information will be excluded from the report.



Select **Skipped** to include information about assigned reading/completion tasks that were skipped because they were not completed before the specified task end date. (For details on the **Task End Date** option in the **Assignees** step of the **Properties Wizard**, see "Advanced Assignee Settings" in the [User's Guide](#)).

To filter documents/questionnaires to only those within a specific date range, click **Choose a date**, and then click **Date Completed** or **Date Assigned** (the date when an assigned task was completed or assigned).




The default date range is the last 30 days from today's date. To change this setting, click , select a different preset date range, and then click **Apply**. If you select **Custom Range**, also select a start and end date, and then click **Apply**.

Select **Documents with no tasks** to include information from all selected documents/questionnaires, regardless of whether they include assigned tasks for their currently active workflow status. For example, information about published documents with no assignees will be included in the report.

6. Click **View Report**.

Note: You can also click **View Report** at any time while setting report options. After changing an option, remember to click **View Report** again to refresh the report contents.

7. Choose a report layout ([see Working with Report Layouts](#)).
8. Choose how you want information in the **Summary** pane displayed ([Working with the Summary Pane](#)).
9. Customize the **Data** grid to show only the data you need in the way you want it represented ([Working with the Data Pane](#)).
10. (Optional) To save all of the report's current document/questionnaire and user selections, option settings, and customizations for future use, click , type a name and description, and then click **OK**.

Note: If dashboards are enabled, a widget (compact view) is automatically created for the saved **Tasks by Document - Current** report. If personal dashboards are enabled, you can add the report widget to **My Dashboard** (see "Setting Up a Personal Dashboard" in the [User's Guide](#)). If the **Home** dashboard is enabled and you're a global or site administrator, you can add the report widget to the system-wide or site dashboard (see "Setting Up a Home Dashboard" in the [Administrator's Guide](#)).

11. (Optional) Print or save the current report results (see [Printing or Saving Report Results](#)).

Report: Tasks by Document - All Tasks

Important: This is one of several next-generation, dynamic grid reports that are fundamentally different than other PolicyTech reports you may have worked with (legacy reports). In legacy reports, all report customization and manipulation is done using report settings, with the report results generated as a static document. In next-generation reports, you set a minimum of report options—such as selecting the documents and users to include—to create report results in the form of an initial framework. The initial report results consist of a Summary section and a Data section, each of which is highly customizable to create precisely the data representation you need.

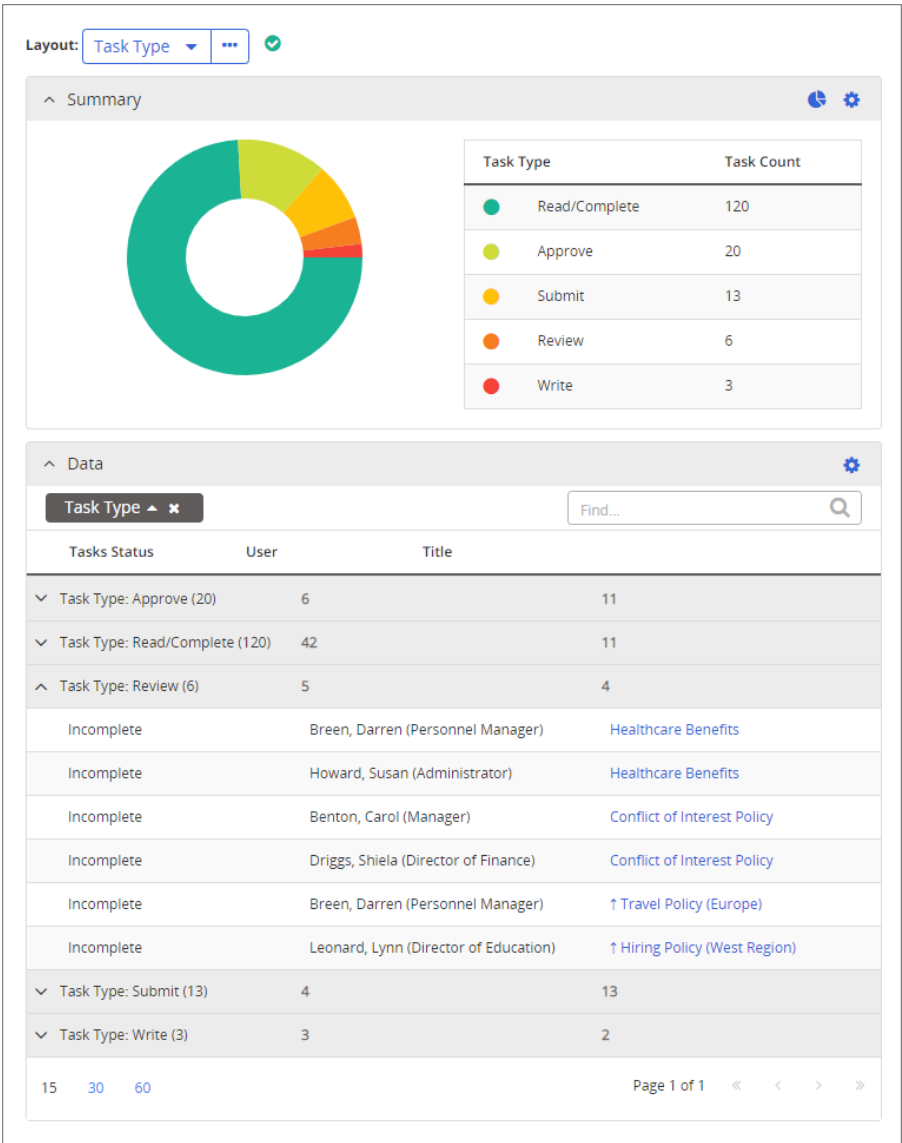
Description

Shows information about all assigned tasks in the selected documents or questionnaires. You can choose to include incomplete and complete tasks as well tasks in upcoming levels.

Available to users with the following roles or permissions:

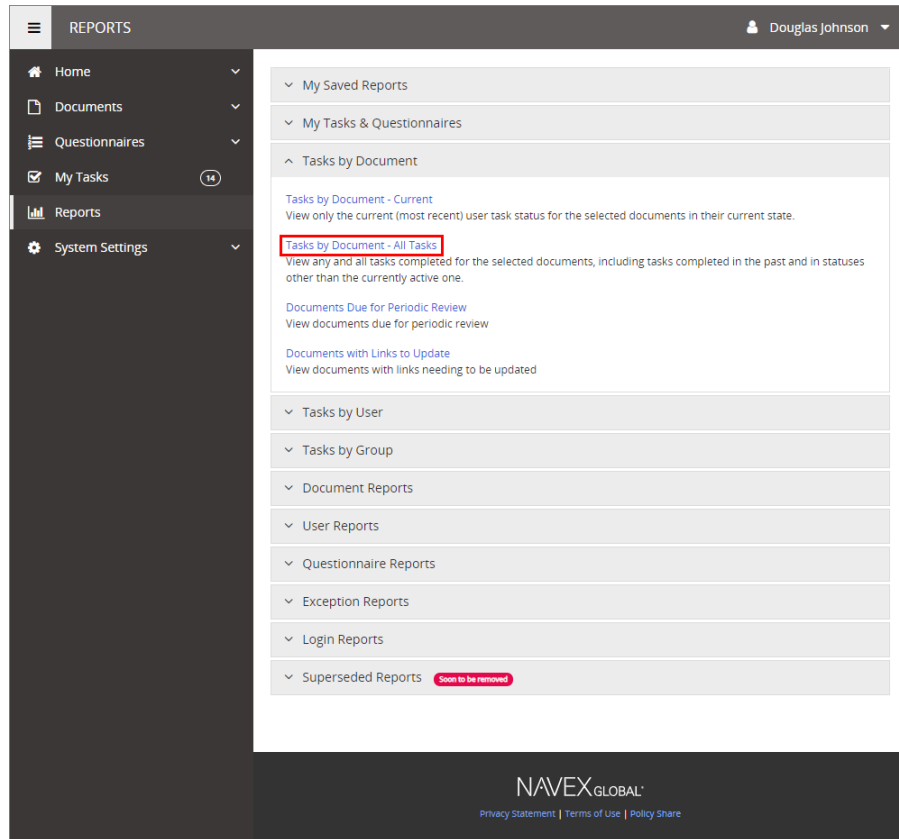
Manager, Report Manager, Administrator

Sample Report:



How to Generate

- 1. Click **Reports**.
- 2. Click **Tasks by Document**, and then click **Tasks by Document - All Tasks**.

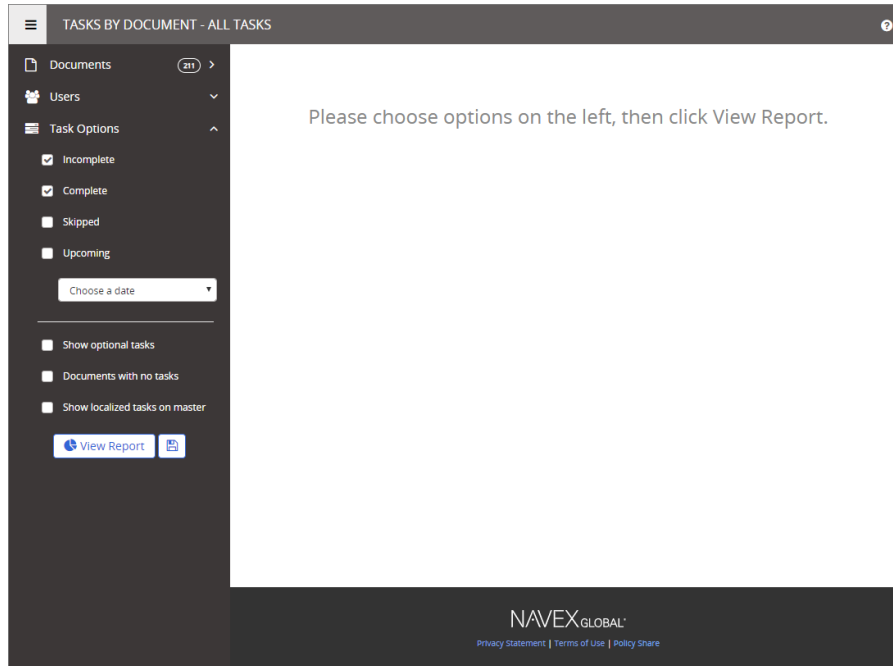


3. Select documents or questionnaires to include in the report (see [Selecting Documents](#) for help), and then click **OK**.

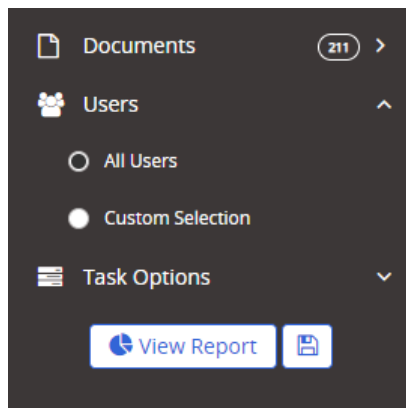
Initial options available for this report are displayed on the left. Notice that the number of currently selected documents or questionnaires is displayed

after the **Documents** option, which you can click anytime to change your document/questionnaire selection.

Note: If you change your document/questionnaire selection after clicking **View Report**, click **View Report** again to refresh the report contents.

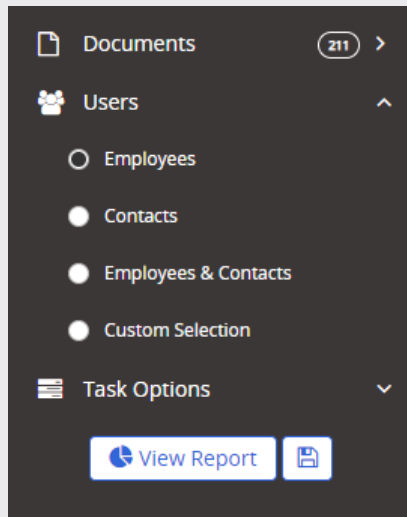


4. (Optional) You have the option to limit the documents/questionnaires included in the report to only those with tasks assigned to specific users. Click **Users**, click **Custom Selection**, and then select users in the same way as you would for a user-based report (see [Selecting Users](#) for help).



Note: If you see the options shown below, then your organization has enabled the Third-Party Accounts Module. The **Employees** option is selected by default, meaning that only those documents/questionnaires assigned to regular PolicyTech users and not third-party contacts are

included in the report. In addition to the **Employees** and **Custom Selection** options, you can choose **Contacts** to limit included documents/questionnaires to only those assigned to third-party contacts, or choose the **Employees & Contacts** option to include all documents/questionnaires, regardless of the types of users assigned.




5. (Optional) Under **Task Options**, **Incomplete** and **Complete** are selected by default, meaning that only those of the currently selected documents/questionnaires that include incomplete or complete tasks for the documents'/questionnaires' current task statuses will be included in the report results. For example, if a selected document is currently published and has at least one assignee designated, that document's information will be included in the report whether the assignees have marked the document as read or not. If a selected published document has no assignees designated, that document's information will be excluded from the report.

Select **Skipped** to include information about assigned reading/completion tasks that were skipped because they were not completed before the specified task end date. (For details on the **Task End Date** option in the **Assignees** step of the **Properties Wizard**, see "Advanced Assignee Settings" in the [User's Guide](#)).

Select **Upcoming** to include information about tasks assigned in a subsequent level in any workflow status. For example, if a selected document has three review levels and is currently in level 1 of the Review status, selecting **Upcoming** would also include information about tasks assigned to Review levels 2 and 3. If that same document also had multiple approval levels, selecting **Upcoming** would also cause the report to include information about upcoming approval tasks, even though the document is still in Review.

To filter documents/questionnaires to only those within a specific date range, click **Choose a date**, and then click **Date Completed** or **Date Assigned** (the date when an assigned task was completed or assigned).

The default date range is the last 30 days from today's date. To change this setting, click , select a different preset date range, and then click **Apply**. If


you select **Custom Range**, also select a start and end date, and then click **Apply**.

Select **Show optional tasks** to include information about complete, optional reading tasks, where users marked documents as read even though they were not assigned reading tasks for those documents.

Select **Documents with no tasks** to include information from all selected documents/questionnaires, regardless of whether they include assigned tasks. For example, information about published documents with no assignee designations will be included in the report.

6. Click **View Report**.

Note: You can also click **View Report** at any time while setting report options. After changing an option, remember to click **View Report** again to refresh the report contents.

7. Choose a report layout ([see Working with Report Layouts](#)).
8. Choose how you want information in the **Summary** pane displayed ([Working with the Summary Pane](#)).
9. Customize the **Data** grid to show only the data you need in the way you want it represented ([Working with the Data Pane](#)).
10. (Optional) To save all of the report's current document/questionnaire and user selections, option settings, and customizations for future use, click , type a name and description, and then click **OK**.

Note: If dashboards are enabled, a widget (compact view) is automatically created for the saved **Tasks by Document - All Tasks** report. If personal dashboards are enabled, you can add the report widget to **My Dashboard** (see "Setting Up a Personal Dashboard" in the [User's Guide](#)). If the **Home** dashboard is enabled and you're a global or site administrator, you can add the report widget to the system-wide or site dashboard (see "Setting Up a Home Dashboard" in the [Administrator's Guide](#)).

11. (Optional) Print or save the current report results (see [Printing or Saving Report Results](#)).

Report: Documents Due for Periodic Review

Description

Shows the status of all tasks for documents or questionnaires that are due for periodic review. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:

Document Owner, Proxy Author, Administrator, Report Manager

Sample Report:

Documents Due for Periodic Review				
NAVEX Global	All Dates	powered by policyratch		
Pages: 2	Generated By: Douglas Johnson	Generated: 2015/06/09 14:40		

Summary

Number of Users	Overdue	In Progress
2	3	0

Review Status by Document

Legend Overdue Due within 1 Month(s) Not Overdue

1. Account Collections Form (v.1)				Ref. #1
	Document Owner Accounting, DocOwner (Owner)	Site Corporate Headquarters	Department Fiscal Services	
Days Remaining (-13)				
Action	Date/Time	In Progress Title (Version)	In Progress Status	Due Date
Waiting	N/A			2011/11/04

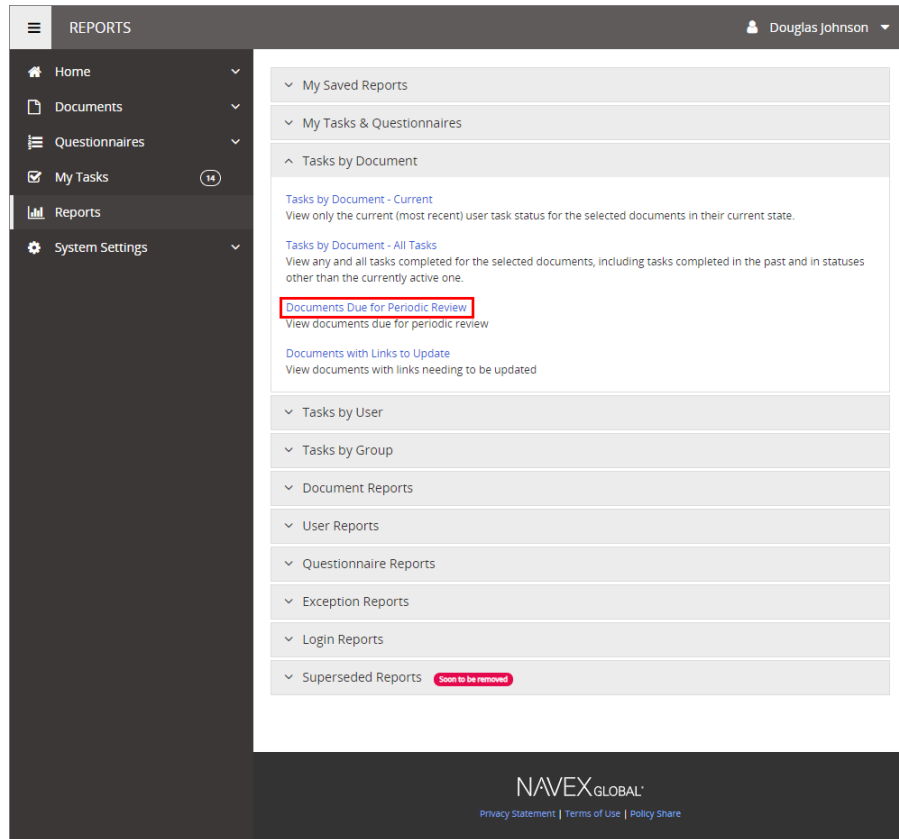
2. Accounts Payable and Cash Distribution (v.1)				Ref. #2
	Document Owner Hansen, Tom (Accounting Manager)	Site Corporate Headquarters	Department Accounting	
Days Remaining (-3)				
Action	Date/Time	In Progress Title (Version)	In Progress Status	Due Date
Waiting	N/A			2014/06/30

3. Bad NSF Checks (v.1)				Ref. #3
	Document Owner Hansen, Tom (Accounting Manager)	Site Corporate Headquarters	Department Accounting	
Days Remaining (-1)				

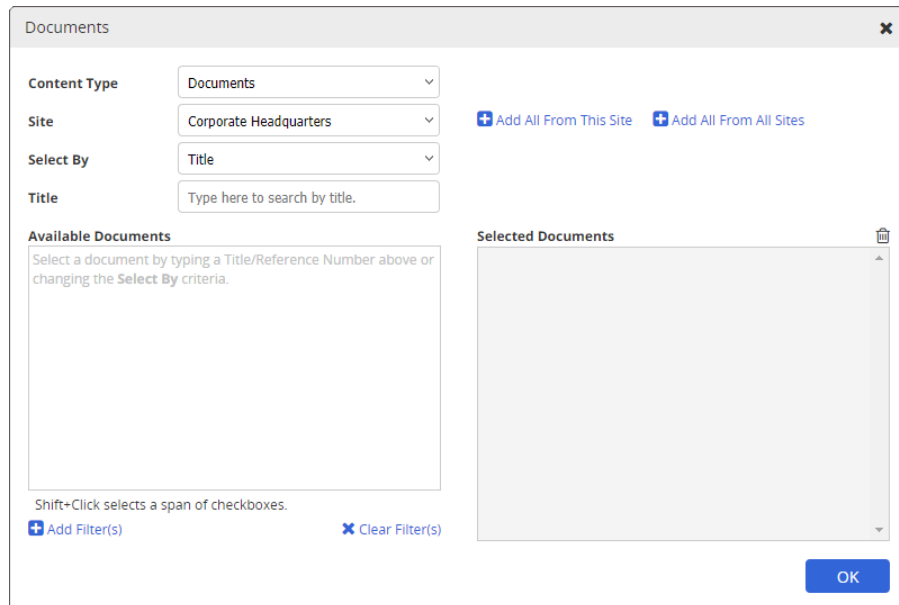
1/2

How to Generate

1. Click **Reports**.
2. Click **Tasks by Document**, and then click **Documents Due for Periodic Review**.



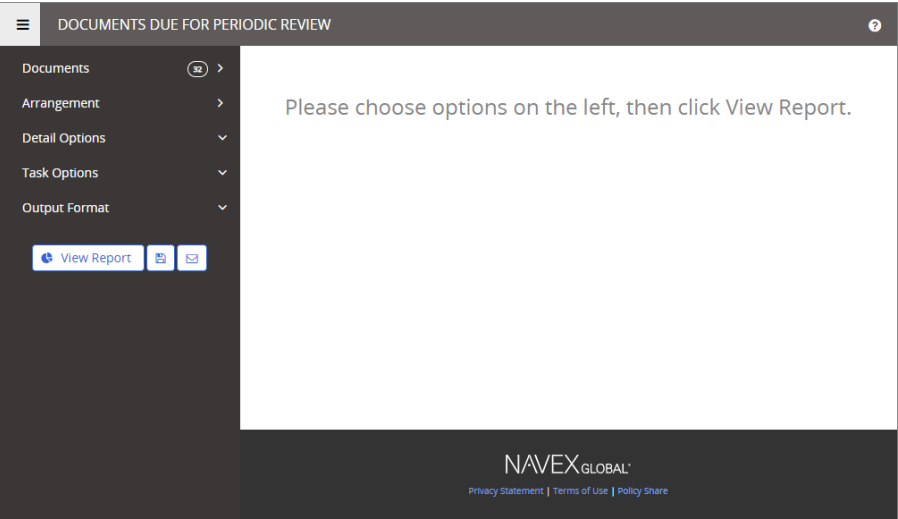
3. Select documents or questionnaires to include in the report (see [Selecting Documents](#) for help), and then click **OK**.



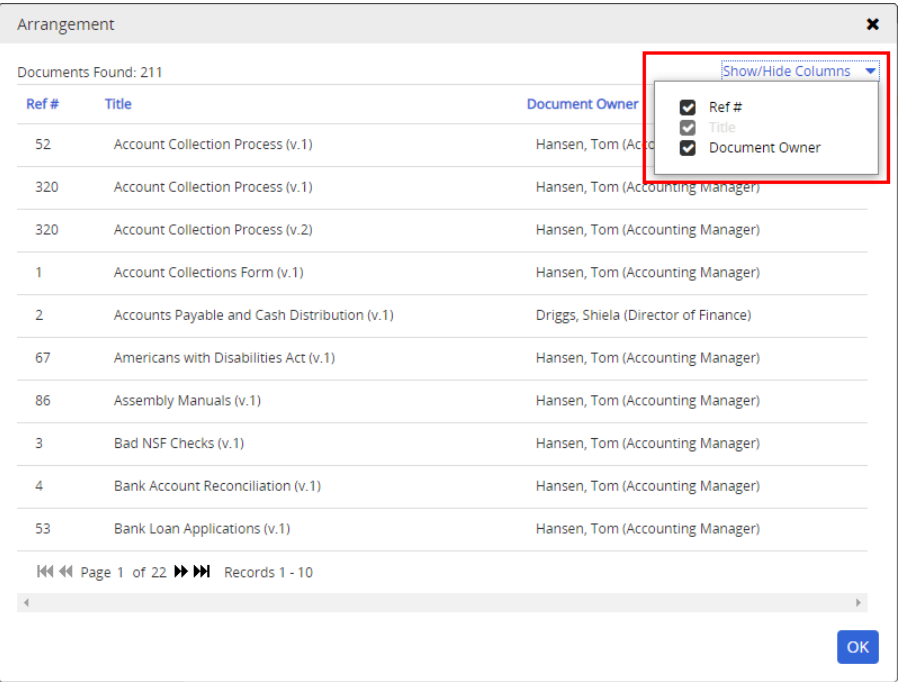
Initial options available for this report are displayed on the left. Notice that the number of currently selected documents or questionnaires is displayed

after the **Documents** option, which you can click anytime to change your document/questionnaire selection.

Note: If you change your document/questionnaire selection after clicking **View Report**, click **View Report** again to refresh the report contents.



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. (Optional) Click **Detail Options**, and then select any of the following:

- **Include Document Details:** Shows the tasks associated with each document or questionnaire in the report.

Review Status by Document

Legend	 Overdue	 Due within 2 Month(s)	 Not Overdue
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1. Cash Drawers (v.2)		Ref. #6	
	Document Owner Hansen, Tom (Accounting Manager)	Site Corporate Headquarters	Department Accounting

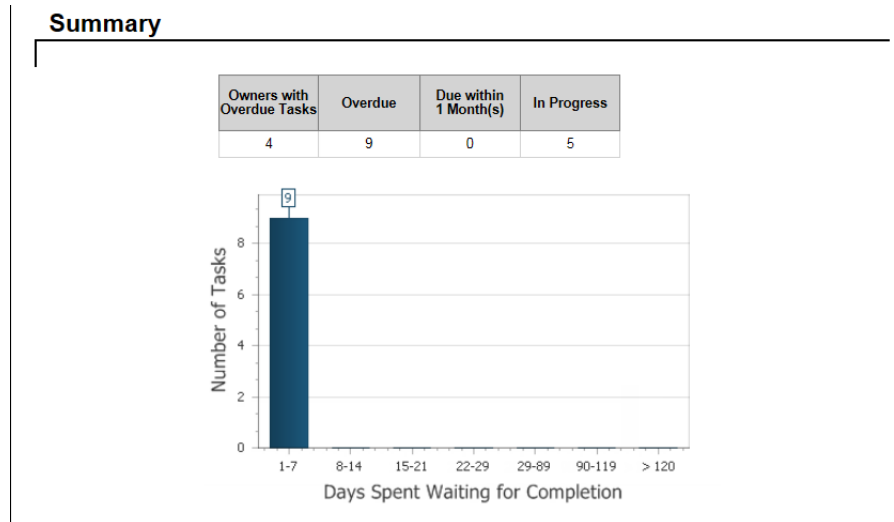
Days Remaining (-4)

Action	Date/Time	In Progress Title (Version)	In Progress Status	Due Date
Waiting	N/A			11/28/2012

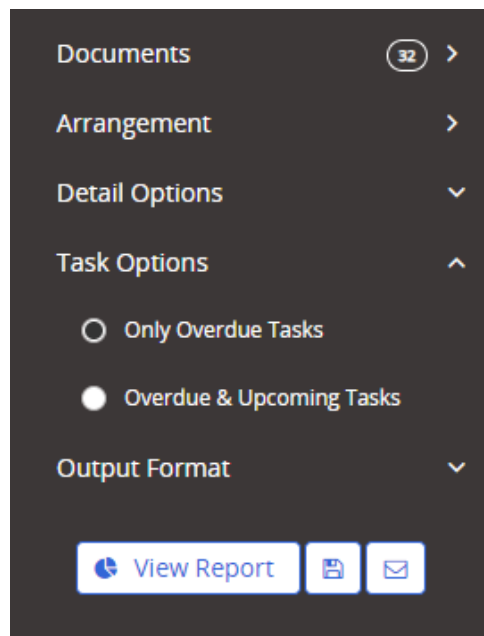
With **Include Document Details** selected, you have the option to limit the documents or questionnaires included in the report to only those with tasks assigned to specific users. Click **Custom Selection**, and then select users in the same way as you would for a user-based report (see [Selecting Users](#) for help).

- **Include Graphs:** Adds a graph to the report's **Summary** area. The graph shows the number of days that tasks for the selected documents

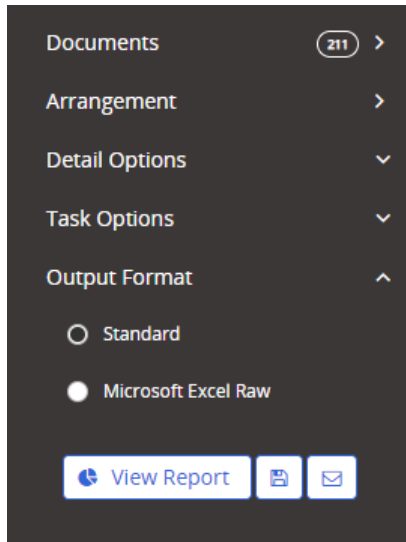
have been waiting for completion.




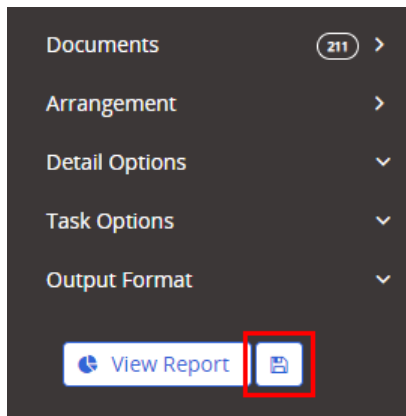
6. Click **Task Options**, and then click **Only Overdue Tasks** or **Overdue & Upcoming Tasks**.




7. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.

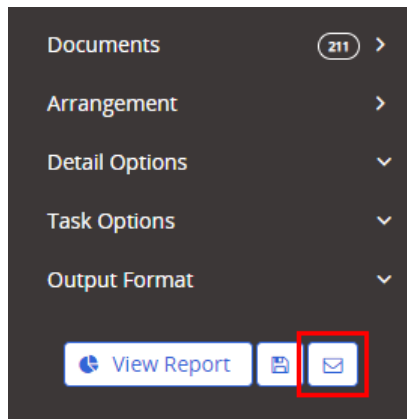


8. (Optional) To save the current document/questionnaire selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

9. (Optional and conditional) Depending on your assigned permissions and email setup, after saving this report you may be able to schedule the summary portion of this report to be automatically generated and emailed to you by clicking  (see [Emailing a Report from a Saved Setup](#) for help).



10. 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.

Documents Due for Periodic Review

NAVEX Global All Dates powered by policytech

Pages: 1 Generated By: Tom Hansen Generated: 05/24/2016 14:34

Summary

Number of Users	Overdue	In Progress
1	2	0

Review Status by Document

Legend ■ Overdue ■ Due within 1 Month(s) ■ Not Overdue

1. Account Collections Form (v.1) Ref. #1

Document Owner	Site	Department
Hansen, Tom (Accounting Manager)	Corporate Headquarters	Accounting

Days Remaining (-16)

Action	Date/Time	In Progress Title (Version)	In Progress Status	Due Date
Waiting	N/A			11/04/2015

2. Accounts Payable and Cash Distribution (v.1) Ref. #2

Document Owner	Site	Department

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Ref. #	Title (Version)	Version Number	Next Review Date	Document Owner Unique ID	Document Owner First Name	Document Owner Middle Name	Document Owner Last Name	Job Title	Site	Department	Action	Date/Time	In Progress Status	Due Date	Days Remaining	
2	6	Cash Drawers	2	11/28/2015	thansen	Tom		Hansen	Accou	Corpo	Accounting	Waiting	N/A		11/28/2015	-11	
3	7	Cash Receipts	1	11/23/2015	thansen	Tom		Hansen	Accou	Corpo	Accounting	Waiting	N/A		11/23/2015	-16	
4	9	Check Request	1	11/23/2015	thansen	Tom		Hansen	Accou	Corpo	Accounting	Waiting	N/A		11/23/2015	-16	
5	25	Check-In Form	1	11/23/2015	djohnson	Douglas	M.	Johnson	Chief E	Corpo	Administrati	In Progr	N/A	Draft	11/23/2015	-16	
6	128	Family and Me	1	11/23/2015	dbreen	Darren		Breen	Person	Corpo	Human Res	In Progr	N/A	Draft	11/23/2015	-16	

Report: Documents with Links to Update

Description

Shows the status of all tasks for documents with outdated links. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:


Document Owner, Proxy Author, Administrator, Report Manager

Sample Report:

Documents with Links to Update

NAVEX Global

All Dates

powered by  policytech

Pages: 1

Generated By: Douglas Johnson

Generated: 06/30/2014 14:44

Summary

Incomplete	Over 30 Days
3	0

Documents with Links to Update

1. Account Collections Form (v.1)	Ref. # 1	Accounting, DocOwner (Owner)	Corporate Headquarters	Accounting
		Incomplete	Over 30 Days	
			0	

Links having tasks (2)

	Action	Date/Time	Current Link	Change Reason	Start Date	Duration
1.	Waiting	N/A	Account Collection Policy (v.1)	Document Archived	06/30/2014	0
2.	Waiting	N/A	Account Collection Procedure (v.1)	New Version	06/30/2014	0

2. Fixed Asset Control (v.1)	Ref. # 270	Howard, Susan (Document, Control Administrator)	Corporate Headquarters	Administration
		Incomplete	Over 30 Days	
			0	

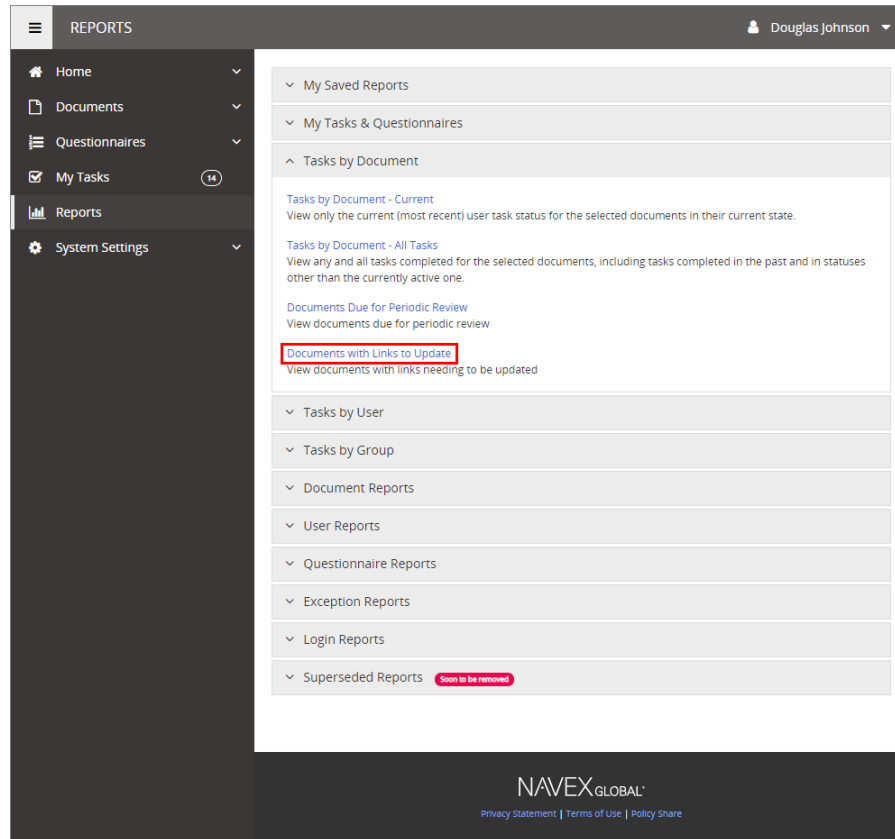
Links having tasks (1)

	Action	Date/Time	Current Link	Change Reason	Start Date	Duration
1.	Waiting	N/A	Quiz Taken (v.1)	New Version	08/29/2011	1035

1/1

How to Generate

1. Click **Reports**.
2. Click **Tasks by Document**, and then click **Documents with Links to Update**.



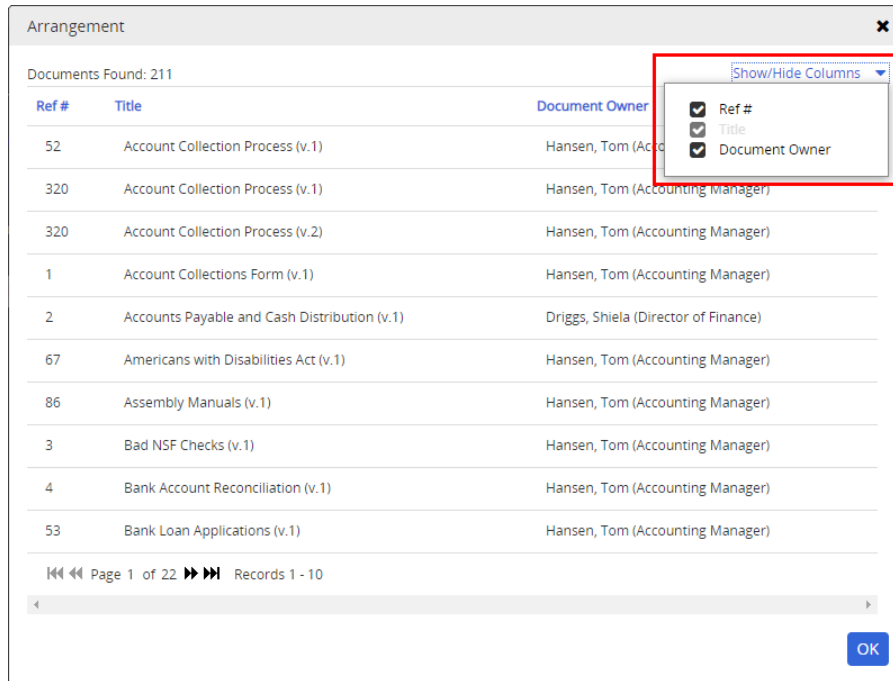
3. Select documents to include in the report (see [Selecting Documents](#) for help), and then click **OK**.

All options available for this report are displayed on the left. Notice that the number of currently selected documents is displayed after the **Documents** option, which you can click anytime to change your document selection.

Note: If you change your document selection after clicking **View Report**, click **View Report** again to refresh the report contents.

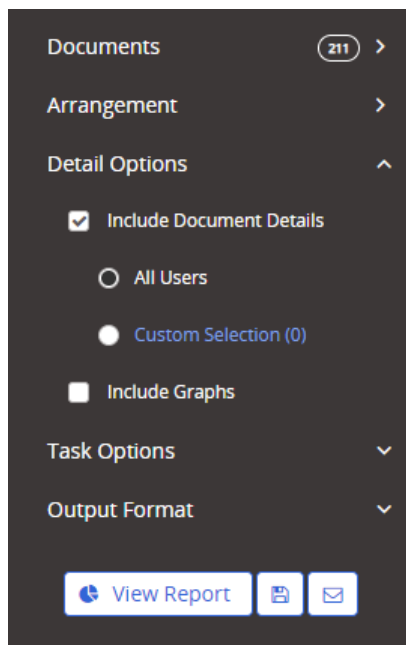
4. (Optional) Click **Arrangement** and do any of the following:

- To change the default report columns, click **Show/Hide Columns**, and then click to clear a check box.



- By default, the document sort order in the report is ascending by title. To change what the documents are sorted by, click a different column heading. Click the same column heading again to reverse the sort order.

5. (Optional) Click **Detail Options**, and then select any of the following:



- **Include Document Details:** Shows the tasks associated with each document in the report.

Documents with Links to Update

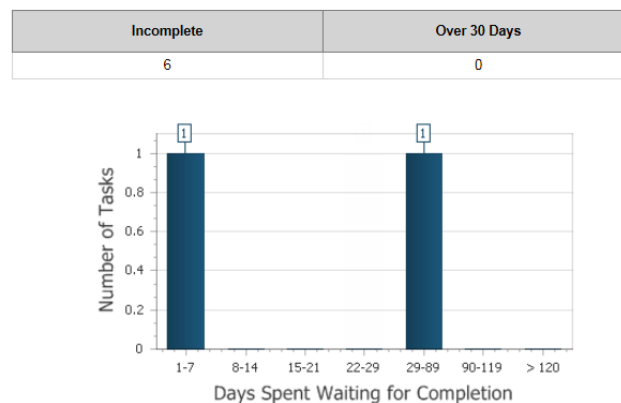
1. Account Collections Form (v.1)	Ref. # 1	Hansen, Tom (Accounting Manager)	Corporate Headquarters	Accounting
No Results Found				
2. Bad NSF Checks (v.1)	Ref. # 3	Hansen, Tom (Accounting Manager)	Corporate Headquarters	Accounting
		Total	Incomplete	Over 30 Days
		1	1	0

Links having tasks (1)					
Action	Date/Time	Current Link	Change Reason	Start Date	Duration
1. Waiting	N/A	Chart of Accounts (v.1)	New Version	09/26/2013	32

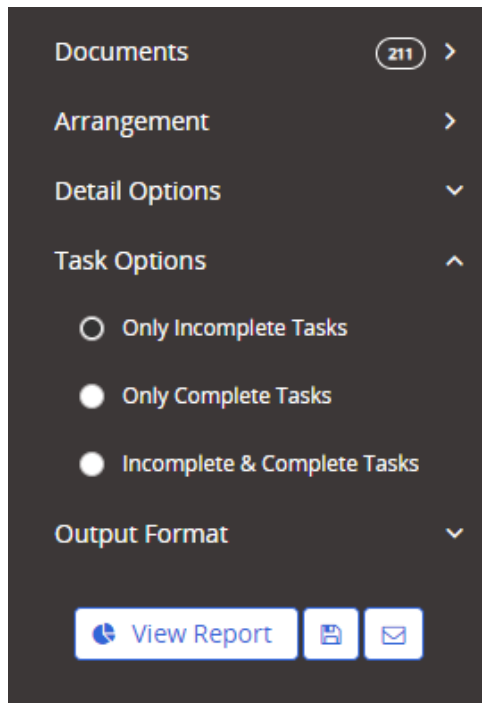
With **Include Document Details** selected, you have the option to limit the documents included in the report to only those with tasks assigned to specific users. Click **Custom Selection**, and then select users in the same way as you would for a user-based report (see [Selecting Users](#) for help).

- **Include Graphs:** Adds a graph to the report's **Summary** area. The graph shows the number of days that tasks for the selected documents have been waiting for completion.

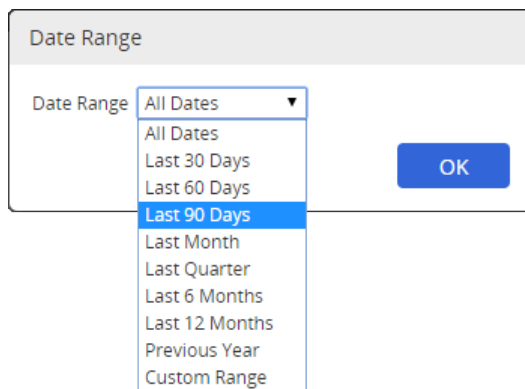
Summary



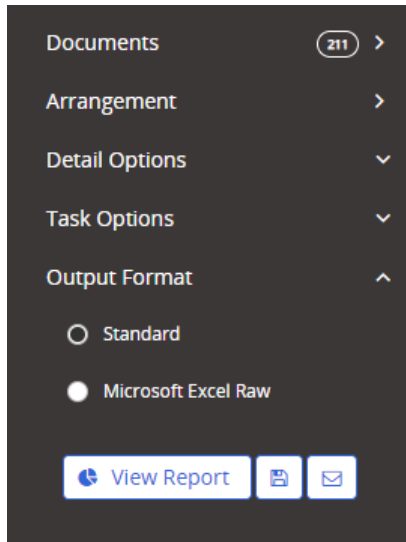
6. Click **Task Options**, and then click **Only Incomplete Tasks**, **Only Complete Tasks** or **Incomplete & Complete Tasks**.




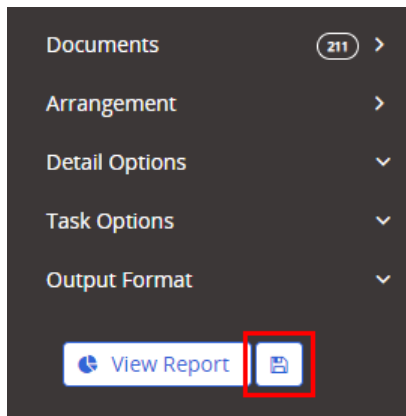
- If you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, the **Date** option appears. To show only the selected tasks that fall within a certain date range, click **Date**, select a date range, and then click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.




7. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.

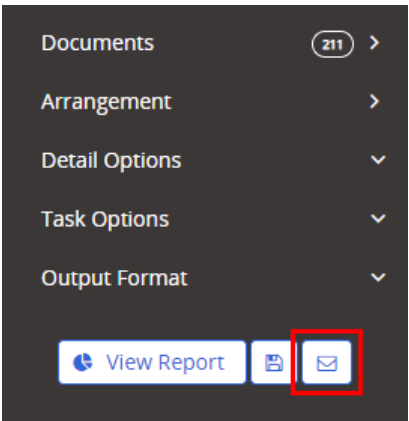


8. (Optional) To save the current document selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



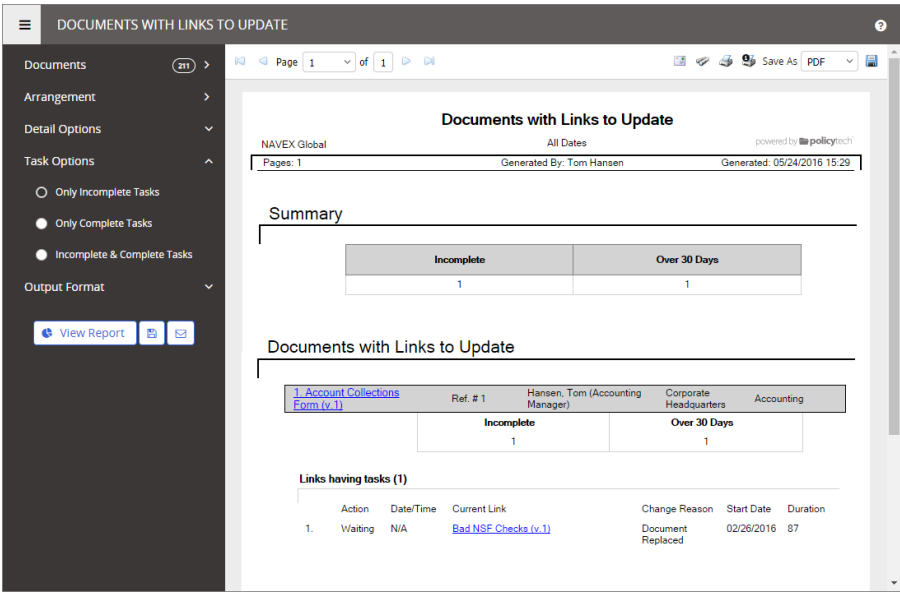
Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

9. (Optional and conditional) Depending on your assigned permissions and email setup, after saving this report you may be able to schedule the summary portion of this report to be automatically generated and emailed to you by clicking  (see [Emailing a Report from a Saved Setup](#) for help).



10. 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**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
	Ref. #	Title (Version)	Version Number	Document Owner Unique ID	Document Owner First Name	Document Owner Middle Name	Document Owner Last Name	Job Title	Site	Department	Incomplete	Total	Over 30 Days	Action	Date/Time	Current Link	Change Reason	Date Assigned	Days Assigned	
1	3	Bad NSF Check	1	thansen	Tom		Hansen	Accounting	Corporate	Accounting	1	0	0	Waiting		Chart of Accounts New Version		9/26/2014	40	
2	215	Handcuffing Poli	1	tgifford	Tawna		Gifford	Document Corp	Administrati		1	0	0	Waiting		Chart of Accounts New Version		9/26/2014	40	
3	219	Handcuffing Poli	1	tgifford	Tawna		Gifford	Document Corp	Administrati		2	0	0	Waiting		Operation & Serv	Document Archi	6/28/2014	37	
4	219	Handcuffing Poli	1	tgifford	Tawna		Gifford	Document Corp	Administrati		2	0	0	Waiting		Management Rep	Document Archi	6/28/2014	130	

Task by User Reports

The **Tasks by User** category includes the following reports:

[Tasks by User - Current](#)

[Tasks by User - All Tasks](#)

[Document Owner - Periodic Review Tasks](#)

[Document Owner - Links to Update Tasks](#)

Report: Tasks by User - Current

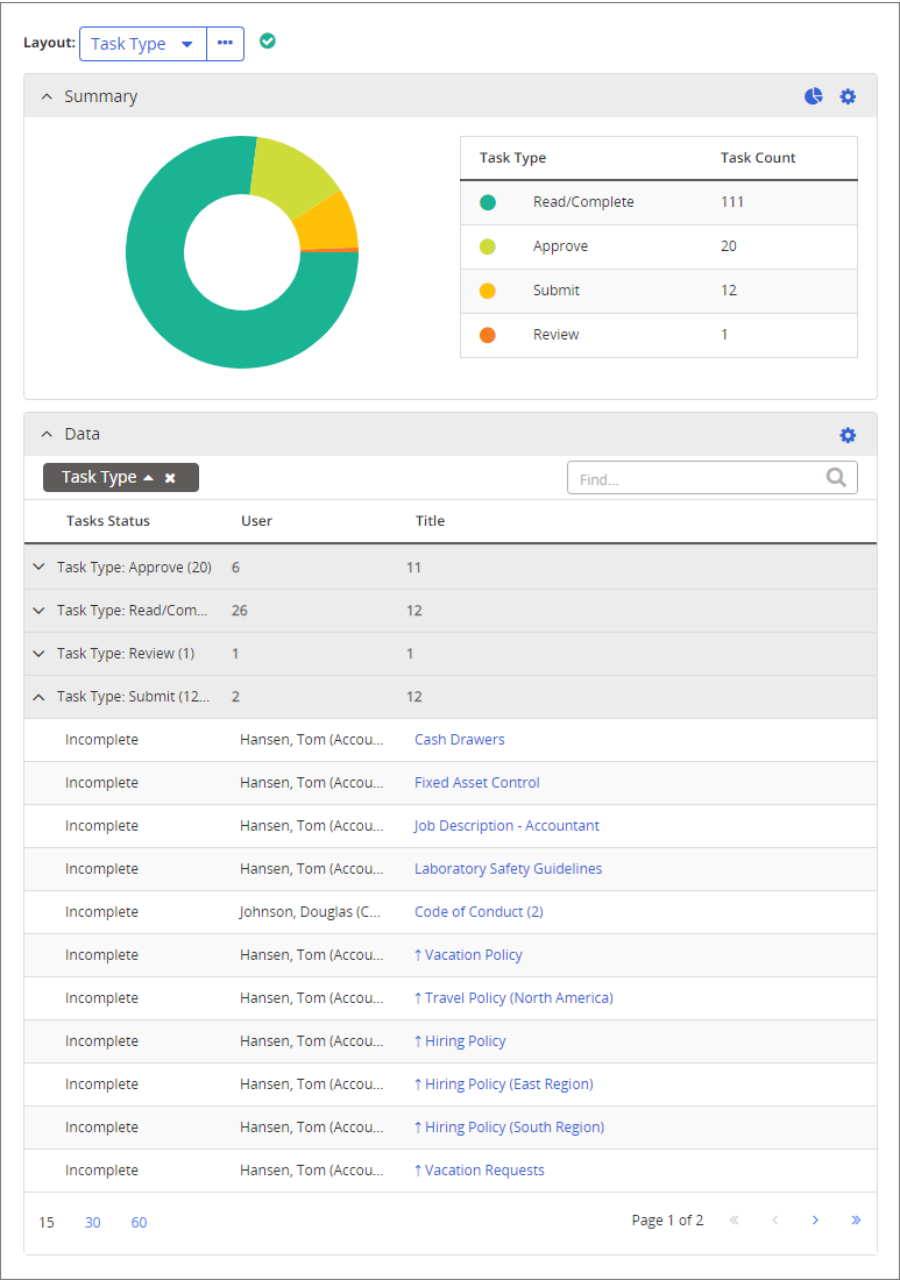
Important: This is one of several next-generation, dynamic grid reports that are fundamentally different than other PolicyTech reports you may have worked with (legacy reports). In legacy reports, all report customization and manipulation is done using report settings, with the report results generated as a static document. In next-generation reports, you set a minimum of report options—such as selecting the documents and users to include—to create report results in the form of an initial framework. The initial report results consist of a Summary section and a Data section, each of which is highly customizable to create precisely the data representation you need.

Description

Shows information about selected users' assigned tasks in currently active workflow statuses. You can choose to include incomplete and complete tasks as well tasks in upcoming levels.

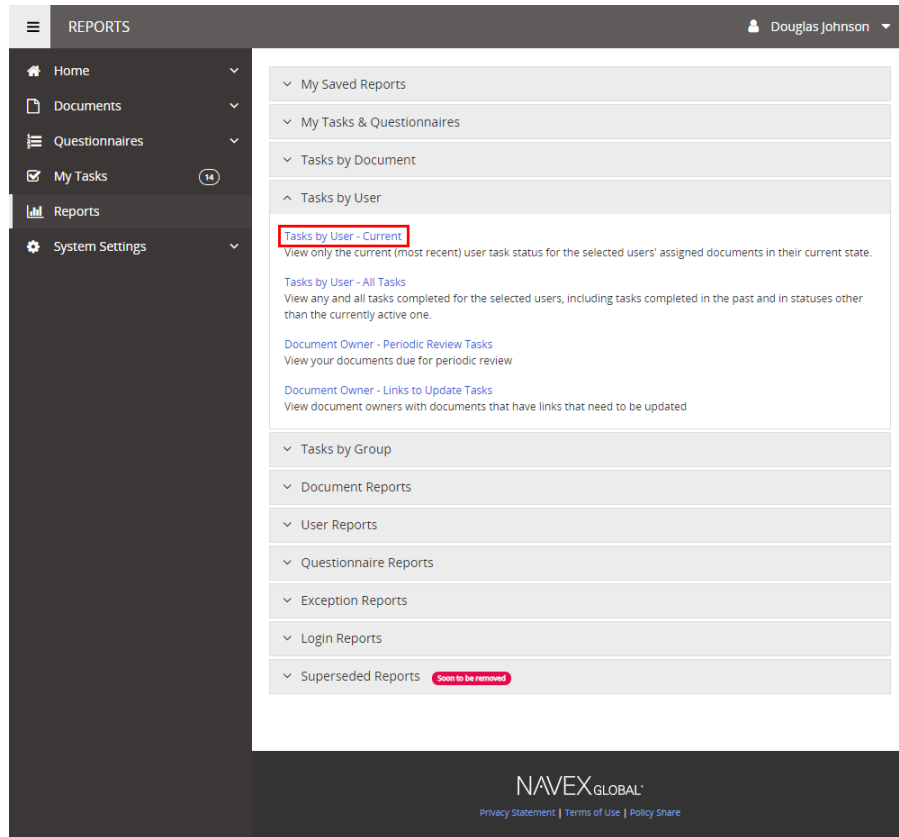
Available to users with the following roles or permissions:

Manager, Report Manager, AdministratorSample Report:

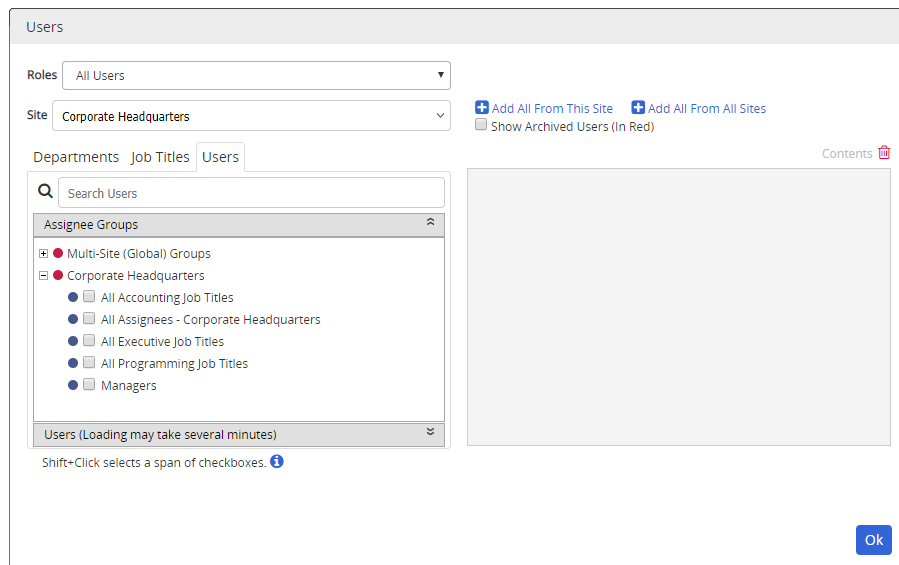


How to Generate

- 1. Click **Reports**.
- 2. Click **Tasks by User**, and then click **Tasks by User - Current**.

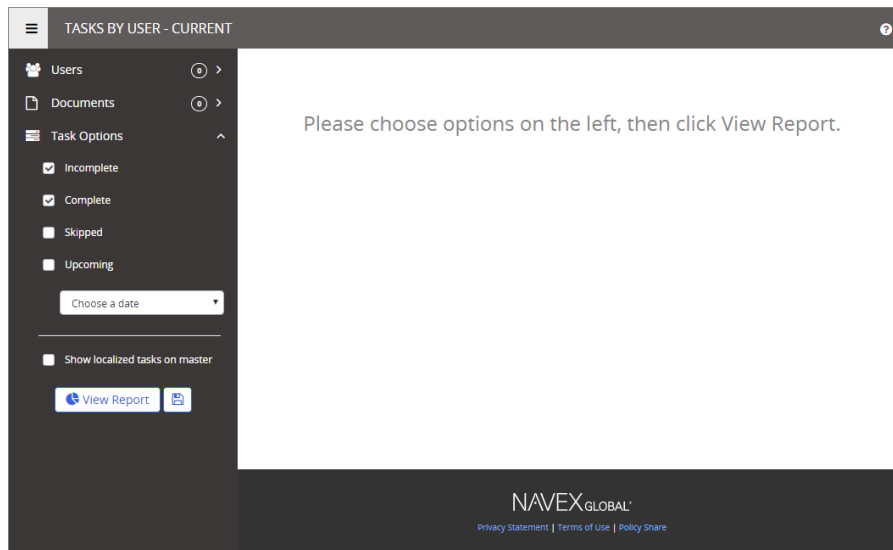


3. Select the users you want included in the report (see [Selecting Users](#) for help).



Initial options available for this report are displayed on the left. Notice that the number of currently selected users is displayed after the **Users** option, which you can click anytime to change your user selection.

Note: If you change your user selection after clicking **View Report**, click **View Report** again to refresh the report contents.




4. (Optional) You have the option to limit the users included in the report to only those with tasks assigned to specific documents. Click **Documents**, and then select documents in the same way as you would for a document-based report (see [Selecting Documents](#) for help).
5. (Optional) Under **Task Options**, **Incomplete** and **Complete** are selected by default, meaning that only those of the currently selected users with task assignments, whether incomplete or complete, will be included in the report results.

Select **Skipped** to include information about assigned reading/completion tasks that were skipped because they were not completed before the specified task end date. (For details on the **Task End Date** option in the **Assignees** step of the **Properties Wizard**, see "Advanced Assignee Settings" in the [User's Guide](#)).


Select **Upcoming** to include information about tasks assigned in a subsequent level in the currently active workflow status. For example, if a selected document has three approval levels and is currently in level 1 of the Approval status, selecting **Upcoming** would also include information about tasks assigned to approval levels 2 and 3.

To filter documents/questionnaires to only those within a specific date range, click **Choose a date**, and then click **Date Completed** or **Date Assigned** (the date when an assigned task was completed or assigned).

The default date range is the last 30 days from today's date. To change this setting, click , select a different preset date range, and then click **Apply**. If you select **Custom Range**, also select a start and end date, and then click **Apply**.

6. Click **View Report**.

Note: You can also click **View Report** at any time while setting report options. After changing an option, remember to click **View Report** again to refresh the report contents.

7. Choose a report layout ([see Working with Report Layouts](#)).
8. Choose how you want information in the **Summary** pane displayed ([Working with the Summary Pane](#)).
9. Customize the **Data** grid to show only the data you need in the way you want it represented ([Working with the Data Pane](#)).
10. (Optional) To save all of the report's current document/questionnaire and user selections, option settings, and customizations for future use, click , type a name and description, and then click **OK**.

Note: If dashboards are enabled, a widget (compact view) is automatically created for the saved **Tasks by User - Current** report. If personal dashboards are enabled, you can add the report widget to **My Dashboard** (see "Setting Up a Personal Dashboard" in the [User's Guide](#)). If the **Home** dashboard is enabled and you're a global or site administrator, you can add the report widget to the system-wide or site dashboard (see "Setting Up a Home Dashboard" in the [Administrator's Guide](#)).

11. (Optional) Print or save the current report results (see [Printing or Saving Report Results](#)).

Report: Tasks by User - All Tasks

Important: This is one of several next-generation, dynamic grid reports that are fundamentally different than other PolicyTech reports you may have worked with (legacy reports). In legacy reports, all report customization and manipulation is done using report settings, with the report results generated as a static document. In next-generation reports, you set a minimum of report options—such as selecting the documents and users to include—to create report results in the form of an initial framework. The initial report results consist of a Summary section and a Data section, each of which is highly customizable to create precisely the data representation you need.

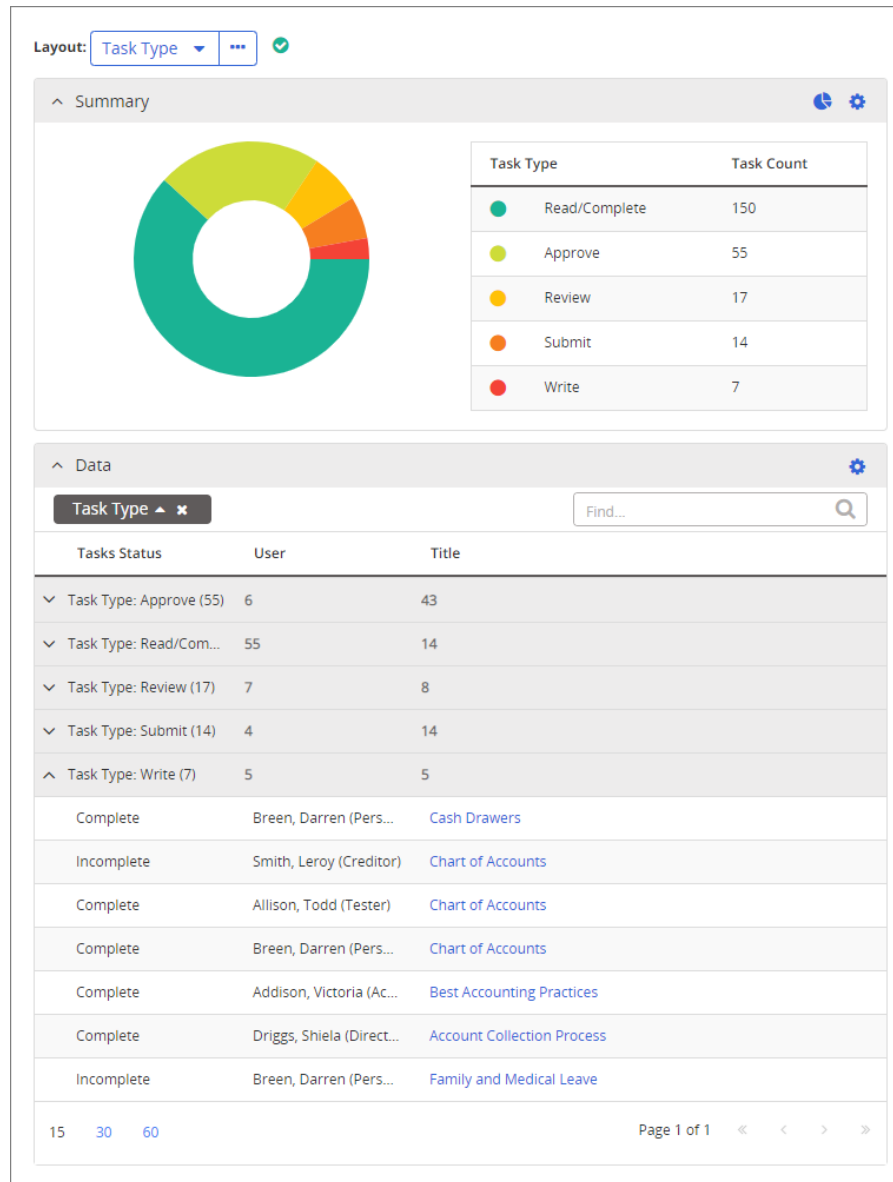
Description

Shows information about all assigned tasks for the selected users. You can choose to include incomplete and complete tasks as well tasks in upcoming levels.

Available to users with the following roles or permissions:

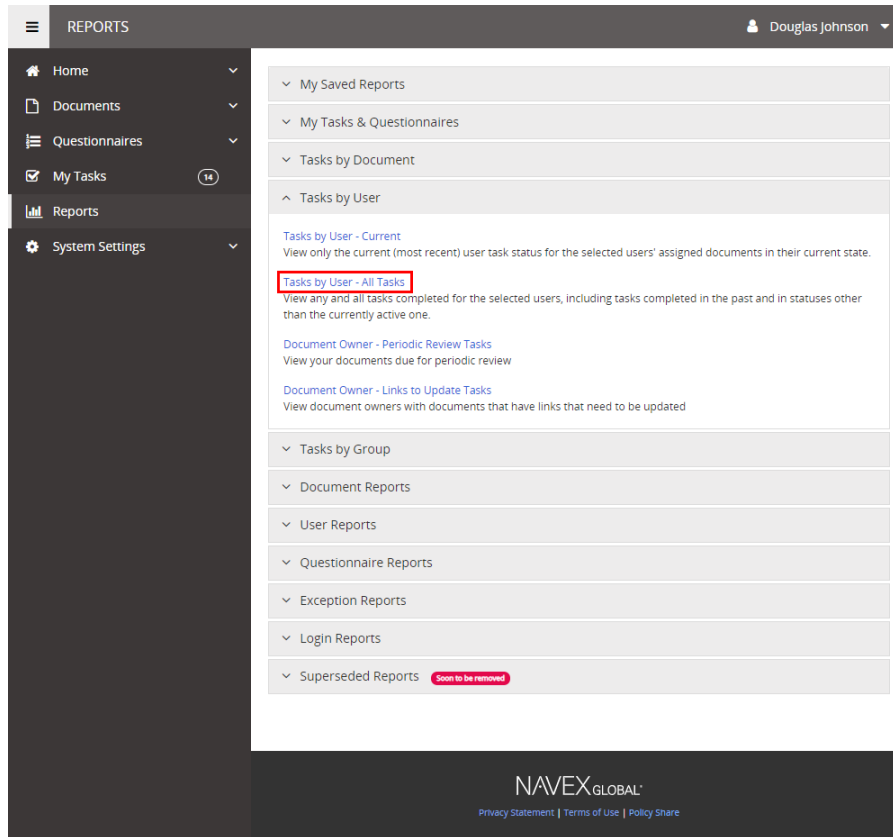
Manager, Report Manager, Administrator

Sample Report:

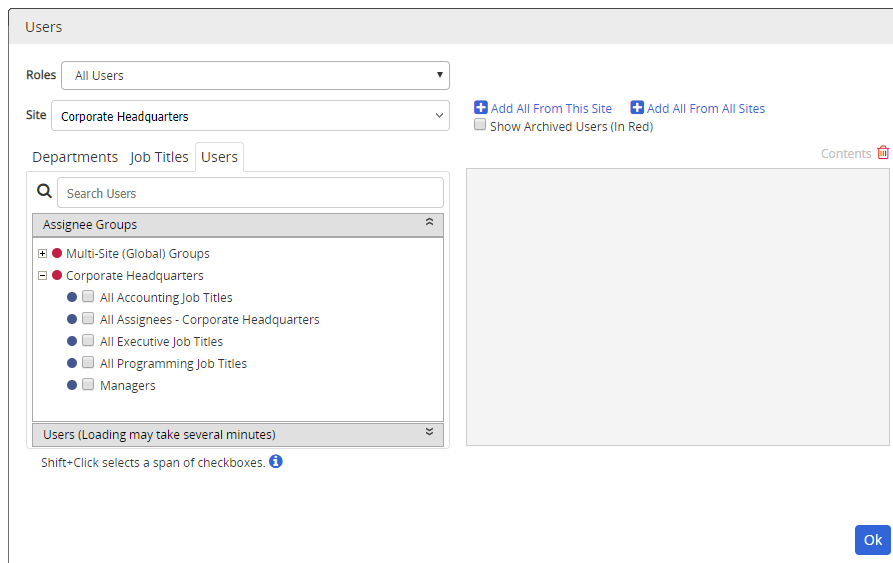


How to Generate

1. Click **Reports**.
2. Click **Tasks by User**, and then click **Tasks by User - All Tasks**.

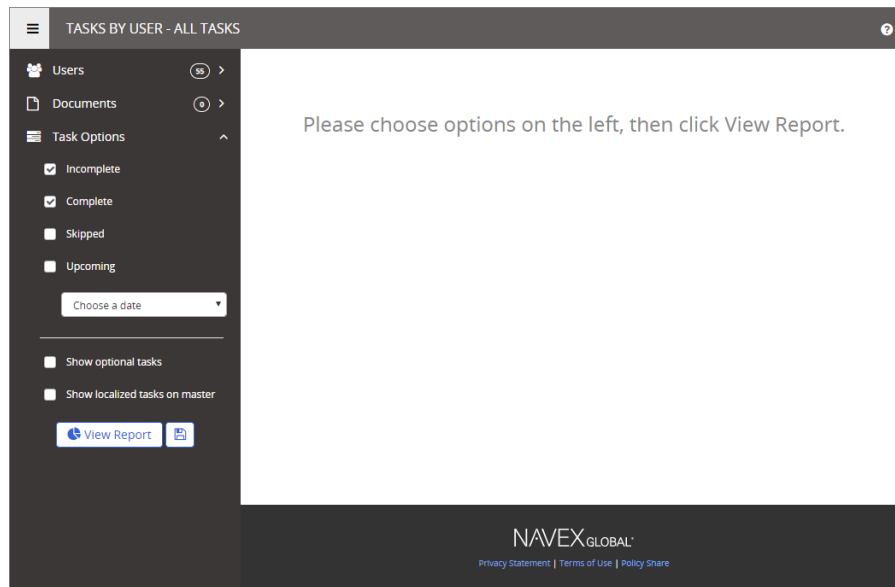


3. Select the users you want included in the report (see [Selecting Users](#) for help).



Initial options available for this report are displayed on the left. Notice that the number of currently selected users is displayed after the **Users** option, which you can click anytime to change your user selection.

Note: If you change your user selection after clicking **View Report**, click **View Report** again to refresh the report contents.




4. (Optional) You have the option to limit the users included in the report to only those with tasks assigned to specific documents or questionnaires. Click **Documents**, and then select documents in the same way as you would for a document-based report (see [Selecting Documents](#) for help).
5. (Optional) Under **Task Options**, **Incomplete** and **Complete** are selected by default, meaning that only those of the currently selected users with task assignments, whether incomplete or complete, will be included in the report results.

Select **Skipped** to include information about assigned reading/completion tasks that were skipped because they were not completed before the specified task end date. (For details on the **Task End Date** option in the **Assignees** step of the **Properties Wizard**, see "Advanced Assignee Settings" in the [User's Guide](#)).

Select **Upcoming** to include information about tasks assigned to selected users in a subsequent level in any workflow status. For example, if a document to which a selected user is assigned has three review levels and is currently in level 1 of the Review status, selecting **Upcoming** would also include information about tasks assigned to Review levels 2 and 3. If that same document also had multiple approval levels, selecting **Upcoming** would also cause the report to include information about upcoming approval tasks, even though the document is still in Review.


To filter documents/questionnaires to only those within a specific date range, click **Choose a date**, and then click **Date Completed** or **Date Assigned** (the date when an assigned task was completed or assigned).

The default date range is the last 30 days from today's date. To change this setting, click , select a different preset date range, and then click **Apply**. If you select **Custom Range**, also select a start and end date, and then click **Apply**.

Select **Show optional tasks** to include information about complete, optional reading tasks, where selected users marked documents as read even though they were not assigned reading tasks for those documents.

6. Click **View Report**.

Note: You can also click **View Report** at any time while setting report options. After changing an option, remember to click **View Report** again to refresh the report contents.

7. Choose a report layout ([see Working with Report Layouts](#)).
8. Choose how you want information in the **Summary** pane displayed ([Working with the Summary Pane](#)).
9. Customize the **Data** grid to show only the data you need in the way you want it represented ([Working with the Data Pane](#)).
10. (Optional) To save all of the report's current document/questionnaire and user selections, option settings, and customizations for future use, click , type a name and description, and then click **OK**.

Note: If dashboards are enabled, a widget (compact view) is automatically created for the saved **Tasks by User - All Tasks** report. If personal dashboards are enabled, you can add the report widget to **My Dashboard** (see "Setting Up a Personal Dashboard" in the [User's Guide](#)). If the **Home** dashboard is enabled and you're a global or site administrator, you can add the report widget to the system-wide or site dashboard (see "Setting Up a Home Dashboard" in the [Administrator's Guide](#)).

11. (Optional) Print or save the current report results (see [Printing or Saving Report Results](#)).

Report: Document Owner - Periodic Review Tasks

Description

Provides details about the selected users' tasks for performing a periodic review on an approved document or questionnaire. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:

Manager, Report Manager, Administrator

Sample Report:

Document Owner Tasks - Overdue Tasks

NAVEX Global All Dates powered by policytech

Pages: 2 Generated By: Johnson, Douglas Generated: 2015/06/09 15:24

Summary

Overdue	Due within 1 Month(s)	Complete
26	N/A	0

Users with Tasks

Legend ■ Overdue ■ Due within 1 Month(s) ■ Not Overdue

1. Hansen, Tom (Accounting Manager) Site: Corporate Headquarters Department: Accounting

■

Owned	Overdue
0	2

Overdue Tasks (2)

	Days Remaining	Action	Ref. #	Title (Version)	In Progress Status
1.	(-3)	Waiting	2	Accounts Payable and Cash Distribution (v.1)	
2.	(-11)	Waiting	3	Bad NSF Checks (v.1)	

2. Howard, Susan (Document, Control Administrator) Site: Corporate Headquarters Department: Administration

■

Owned	Overdue
0	19

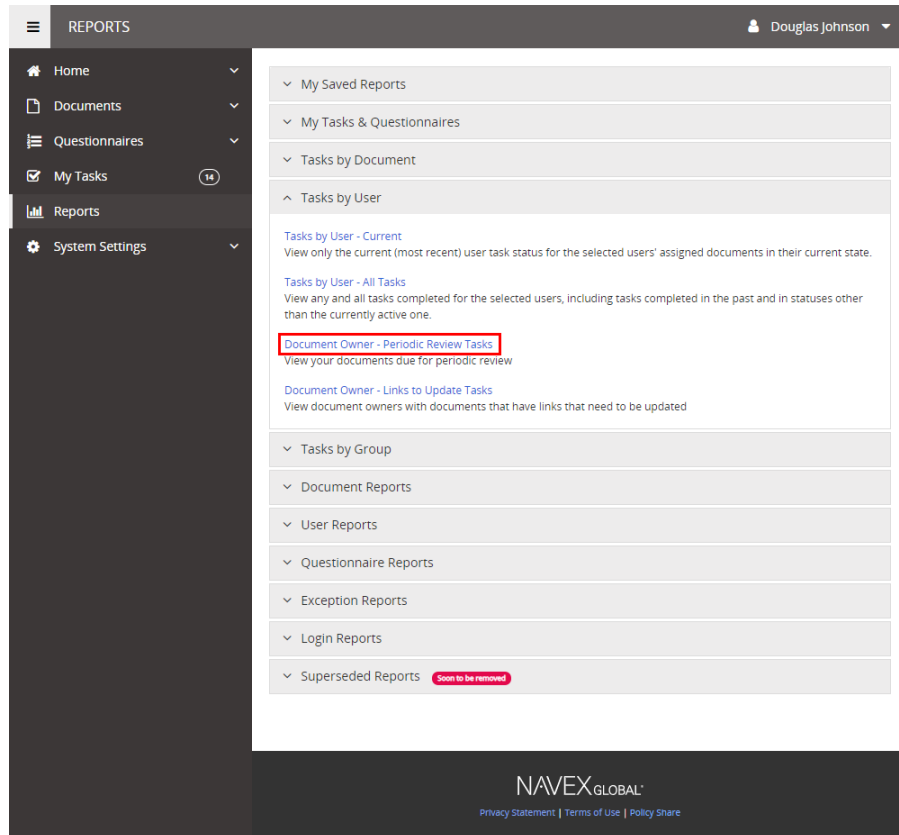
Overdue Tasks (19)

	Days Remaining	Action	Ref. #	Title (Version)	In Progress Status
1.	(-15)	Waiting	270	Fixed Asset Control (v.1)	
2.	(-1)	Waiting	275	Read Interval Due (v.1)	
3.	(-3)	Waiting	242	Vacation Policy (v.1)	

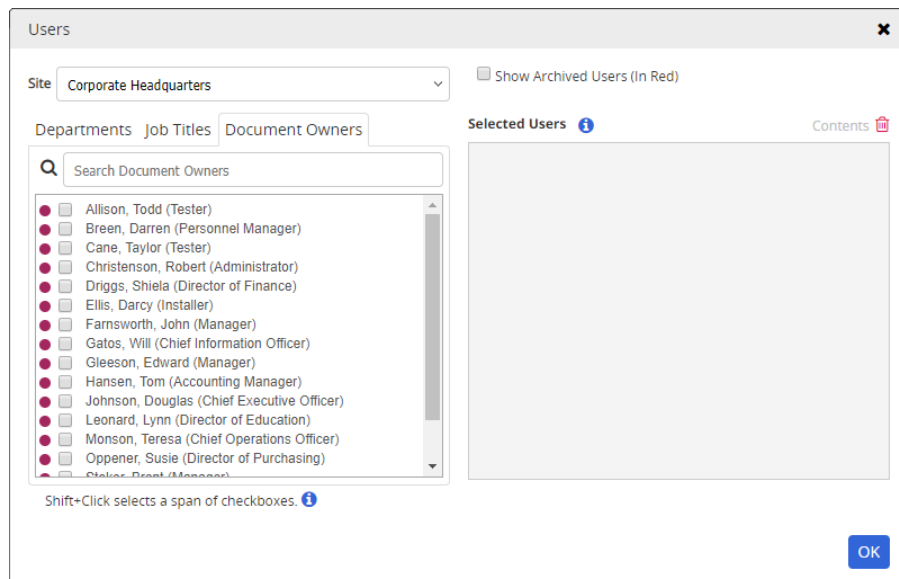
1/2

How to Generate

1. Click **Reports**.
2. Click **Tasks by User**, and then click **Document Owner - Periodic Review Tasks**.

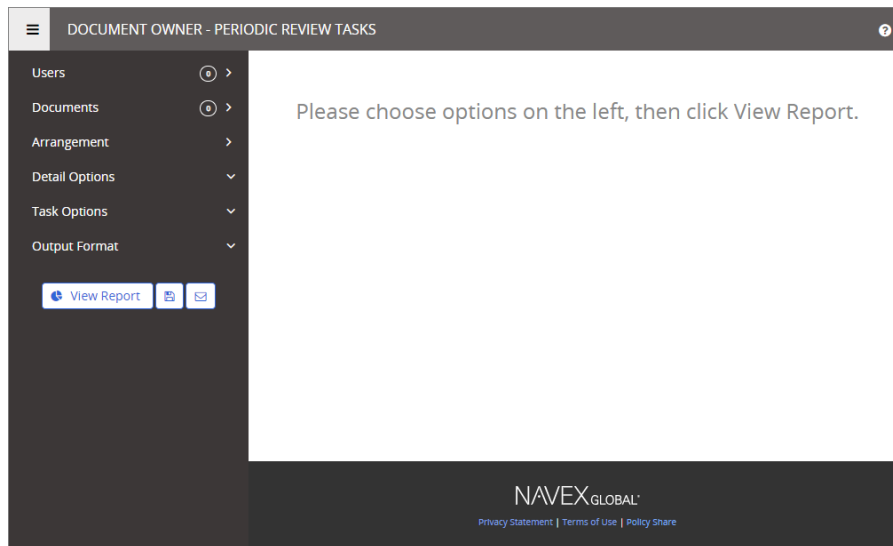


3. Select the users you want included in the report (see [Selecting Users](#) for help).



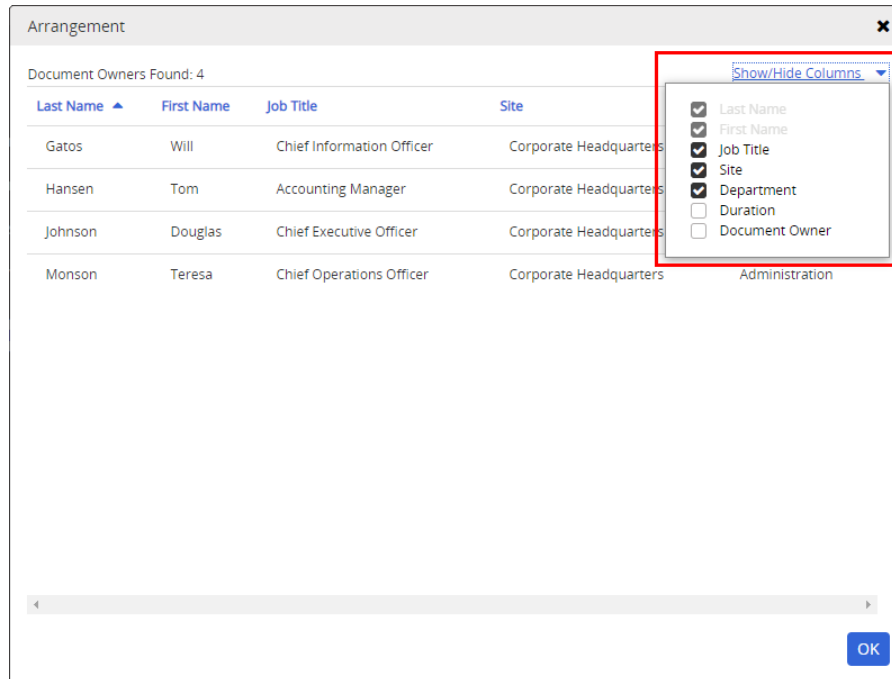
All options available for this report are displayed on the left. Notice that the number of currently selected users is displayed after the **Users** option, which you can click anytime to change your user selection.

Note: If you change your user selection after clicking **View Report**, click **View Report** again to refresh the report contents.



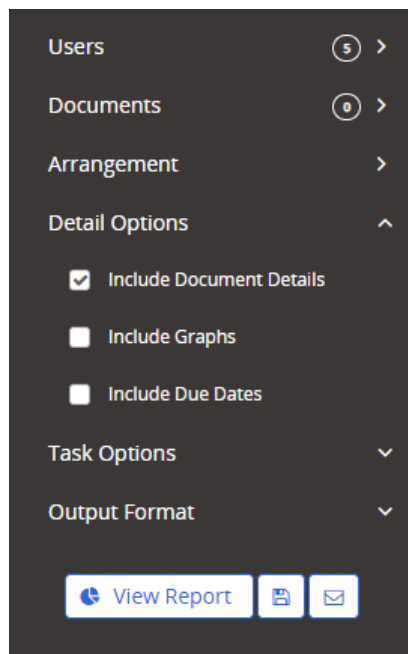
4. (Optional) To limit the selected users to only those assigned to specific documents or questionnaires, click **Documents**, and then select documents/questionnaires in the same way as you would for a document-based report (see [Selecting Documents](#) for help).
5. (Optional) Click **Arrangement** and do any of the following:
 - To change the default report columns, click **Show/Hide Columns**, and then select or click to clear check boxes.

Note: The **Duration** column shows how many days an incomplete task has been assigned or how many days it took to complete a task.



- By default, the user sort order in the report is ascending by last name. To change what the users are sorted by, click a different column heading. Click the same column heading again to reverse the sort order.

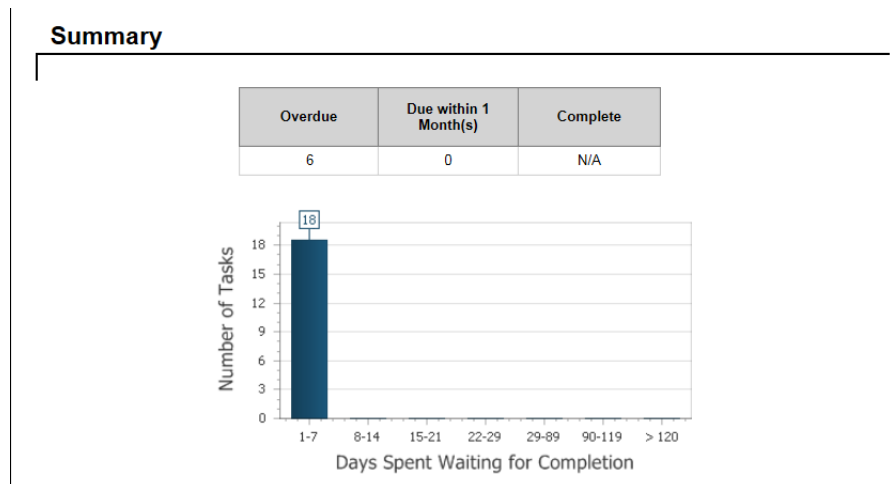
6. (Optional) Click **Detail Options**, and then select any of the following:



- **Include Document Details:** Shows the tasks associated with each document or questionnaire in the report.

1. Benton, Carol (Environmental Control Manager)		Site: Corporate Headquarters	Department: Environmental Services																
		<div></div>	<div>Overview</div> <div>Owned (18)</div> <div>Overdue (1)</div> <div>Due within 2 Month(s) (0)</div>																
<div>Incomplete Tasks</div> <table><tr><th></th><th><u>Days Remaining</u></th><th><u>Action</u></th><th><u>Date/Time</u></th><th><u>Ref. #</u></th><th><u>Title (Version)</u></th><th><u>In Progress Status</u></th><th><u>Due Date</u></th></tr><tr><td>1.</td><td>(-24)</td><td>In Progress</td><td>N/A</td><td>43</td><td> Air, Water & Soil Resource Management (v.1)</td><td>Draft</td><td>03/24/2013</td></tr></table>					<u>Days Remaining</u>	<u>Action</u>	<u>Date/Time</u>	<u>Ref. #</u>	<u>Title (Version)</u>	<u>In Progress Status</u>	<u>Due Date</u>	1.	(-24)	In Progress	N/A	43	 Air, Water & Soil Resource Management (v.1)	Draft	03/24/2013
	<u>Days Remaining</u>	<u>Action</u>	<u>Date/Time</u>	<u>Ref. #</u>	<u>Title (Version)</u>	<u>In Progress Status</u>	<u>Due Date</u>												
1.	(-24)	In Progress	N/A	43	 Air, Water & Soil Resource Management (v.1)	Draft	03/24/2013												

- **Include Graphs:** Adds a graph to the report's **Summary** area. The graph shows the number of days the selected users' tasks have been waiting for completion.

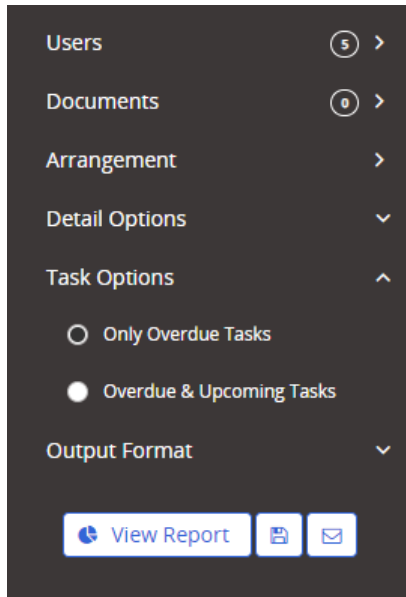


- **Include Due Dates:** Adds a **Due Date** column to the task details.

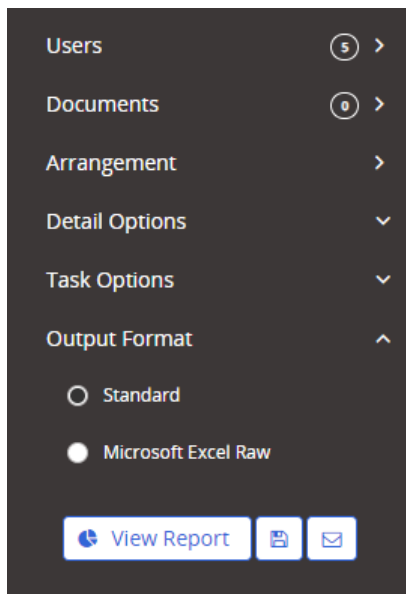
Important: This option applies only if the **Include Document Details** option is selected.


Incomplete Tasks							
	Days Remaining	Action	Date/Time	Ref. #	Title (Version)	In Progress Status	Due Date
1.	24	Waiting	N/A	2	Accounts Payable and Cash Distribution (v.1)	Draft	11/30/2014
2.	(-9)	Waiting	N/A	3	⚠ Bad NSF Checks (v.1)		11/15/2014
3.	0	In Progress	N/A	4	⚠ Bank Account Reconciliation (v.1)		11/06/2014
4.	20	Waiting	N/A	5	Capitilization (v.2)		11/26/2014

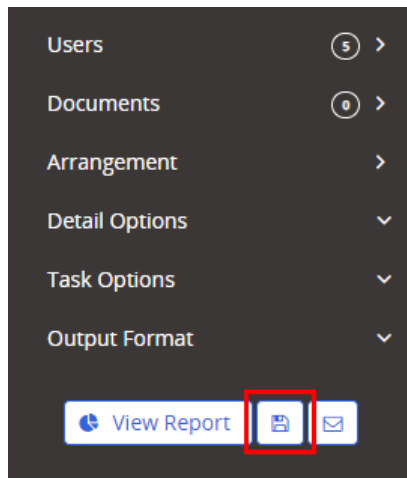
7. (Optional) Click **Task Options**, and then click **Only Overdue Tasks** or **Overdue & Upcoming Tasks**.




8. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.

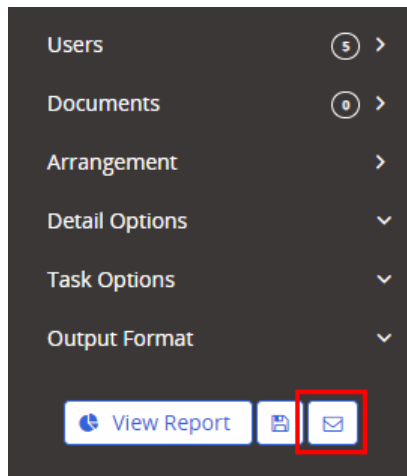


9. (Optional) To save the current user selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

10. (Optional and conditional) Depending on your assigned permissions and email setup, after saving this report you may be able to schedule the summary portion of this report to be automatically generated and emailed to you by clicking  (see [Emailing a Report from a Saved Setup](#) for help).



11. 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.

DOCUMENT OWNER - PERIODIC REVIEW TASKS

Page 1 of 2

Document Owner Tasks - Overdue Tasks

NAVEX Global All Dates powered by policyrachi

Pages: 1 Generated By: Johnson, Douglas Generated: 05/26/2016 13:31

Summary

Overdue	Due within 1 Month(s)	Complete
2	N/A	0

Users with Tasks

Legend: ■ Overdue ■ Due within 1 Month(s) ■ Not Overdue

1. Allison, Todd (Tester) Site: Corporate Headquarters Department: Quality Assurance

Owned	Overdue
0	2

Overdue Tasks (2)

Days Remaining	Action	Ref. #	Title (Version)	In Progress Status	Due Date
1. (-19)	Waiting	226	Chart of Accounts (v.1)		02/21/2011

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
	First Name	Last Name	Job Title	Unique Employee ID	Email	Site	Department	Owned	Due within 1 Month(s)	Overdue	Action	Date/Time	Ref. #	Title (Version)	Version Number	Due Date	Days Remaining	Task Type
1	Tom	Hanse Acco	thansen	thansen	thansen	Corpor	Accounting	27	0	4	Waiting	N/A	2	Accounts Payal	1	06/30/2014	-12	Periodic Review
3	Tom	Hanse Acco	thansen	thansen	thansen	Corpor	Accounting	27	0	4	Waiting	N/A	3	Bad NSF Check	1	03/04/2012	-9	Periodic Review
4	Tom	Hanse Acco	thansen	thansen	thansen	Corpor	Accounting	27	0	4	In Progress	N/A	4	Bank Account	1	11/06/2014	0	Periodic Review

Report: Document Owner - Links to Update Tasks

Description

Provides details about the selected users' tasks for updating links within documents they own. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:

Manager, Report Manager, Administrator

Sample Report:

Document Owner - Links to Update Tasks

Delta Regional Medical Center All Dates powered by **policytech**

Pages: 1 Generated By: Susan Howard Generated: 04/17/2013 11:23 AM

Summary

Incomplete	Over 30 Days
3	1

Users with Links to Update

1. Hansen, Tom (Accounting Manager)

Incomplete	Over 30 Days
1	0

Links having tasks (1)

Action	Date/Time	Current Link	Change Reason	Start Date	Days Assigned
1. Waiting		Check Signing Authority (v.1)	Document Archived	04/03/2013	14

2. Howard, Susan (Document Control Administrator)

Incomplete	Over 30 Days
2	1

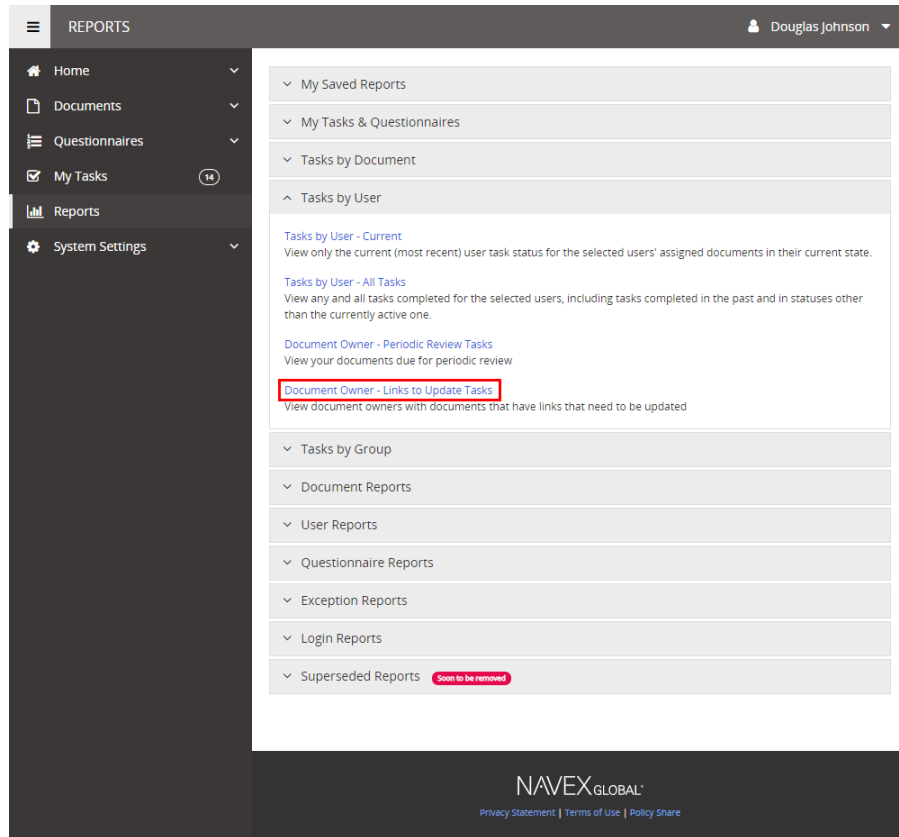
Links having tasks (2)

Action	Date/Time	Current Link	Change Reason	Start Date	Days Assigned
1. Waiting		Chart of Accounts (v.1)	Document Replaced	03/11/2013	37
2. Waiting		Check Signing Authority (v.1)	Document Archived	04/03/2013	14

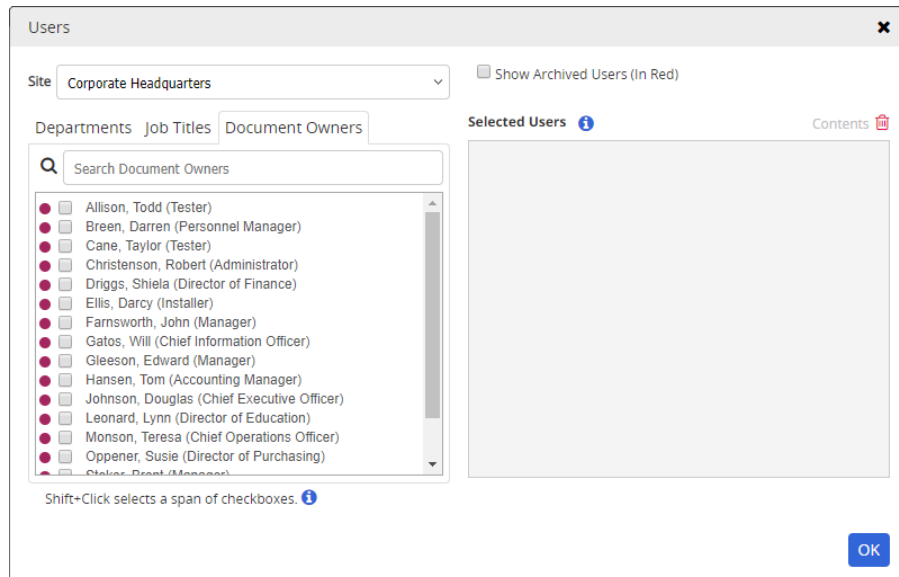
1/1

How to Generate

1. Click **Reports**.
2. Click **Tasks by User**, and then click **Document Owner - Links to Update Tasks**.

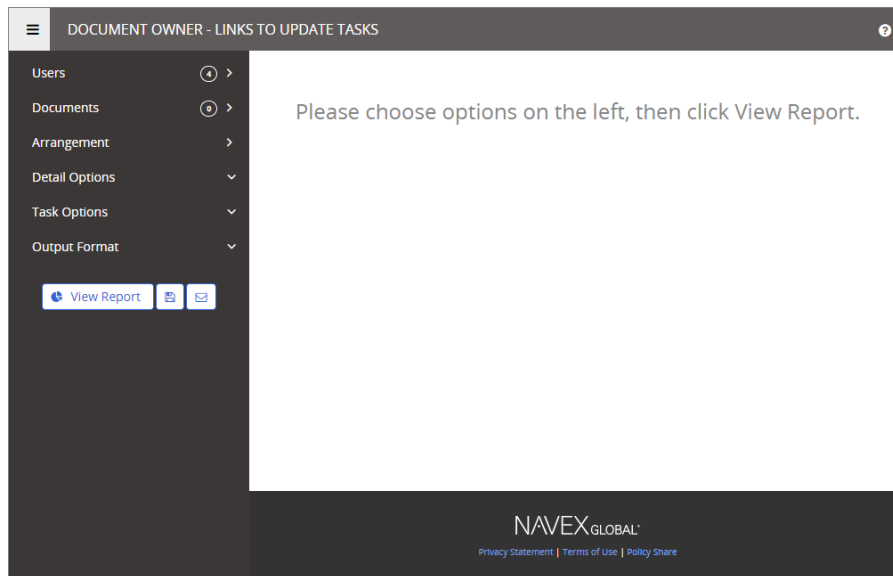


3. Select the users you want included in the report (see [Selecting Users](#) for help).



All options available for this report are displayed on the left. Notice that the number of currently selected users is displayed after the **Users** option, which you can click anytime to change your user selection.

Note: If you change your user selection after clicking **View Report**, click **View Report** again to refresh the report contents.



4. (Optional) To limit the selected users to only those assigned to specific documents, click **Documents**, and then select documents in the same way as you would for a document-based report (see [Selecting Documents](#) for help)..
5. (Optional) Click **Arrangement** and do any of the following:
 - To change the default report columns, click **Show/Hide Columns**, and then select or click to clear check boxes.

Note: The **Duration** column shows how many days an incomplete task has been assigned or how many days it took to complete a task.

Arrangement ✕

Document Owners Found: 4

Last Name ▲	First Name	Job Title	Site
Gatos	Will	Chief Information Officer	Corporate Headquarters
Hansen	Tom	Accounting Manager	Corporate Headquarters
Johnson	Douglas	Chief Executive Officer	Corporate Headquarters
Monson	Teresa	Chief Operations Officer	Corporate Headquarters

Administration

Show/Hide Columns

- ☒ Last Name
- ☒ First Name
- ☒ Job Title
- ☒ Site
- ☒ Department
- ☐ Duration
- ☐ Document Owner

OK

- By default, the user sort order in the report is ascending by last name. To change what the users are sorted by, click a different column heading. Click the same column heading again to reverse the sort order.

6. (Optional) Click **Detail Options**, and then select any of the following:

Users 4 >

Documents 0 >

Arrangement >

Detail Options ^

- ☒ Include Document Details
- ☐ Include Graphs
- ☐ Include Due Dates

Task Options ▼

Output Format ▼

View Report 📄 ✉

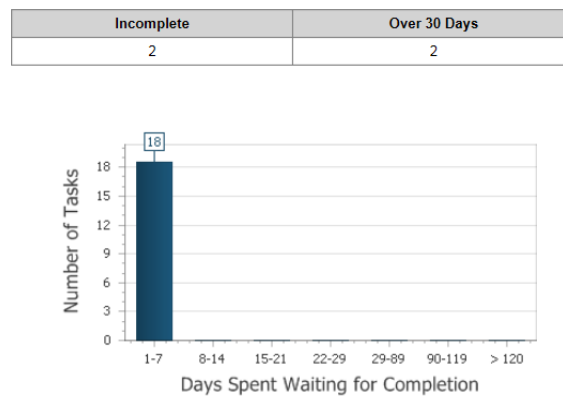
- **Include Document Details:** Shows the tasks associated with each document in the report.

1. Howard, Susan (Document, Control Administrator)		Site: Corporate Headquarters	Department: Administration
Incomplete		Over 30 Days	
2		2	

Links to Update (2)					
Action	Date/Time	Current Link	Change Reason	Start Date	Days Assigned
1. Waiting		Preferred Hotels (v.1)	New Version	08/29/2011	1164

- **Include Graphs:** Adds a graph to the report's **Summary** area. The graph shows the number of days the selected users' tasks have been waiting for completion.

Summary



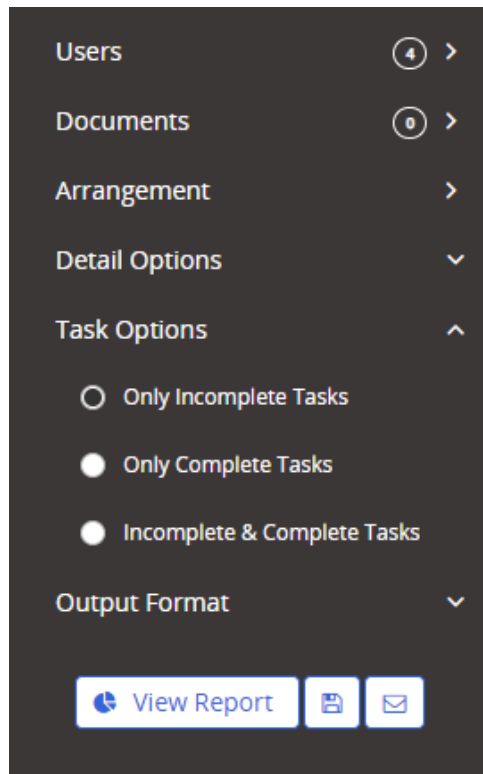
- **Include Due Dates:** Adds a **Due Date** column to the task details.

Important: This option applies only if the **Include Document Details** option is selected.

Incomplete Tasks (2)					
Action	Ref. #	Title (Version)	Start Date	Days Assigned	Due Date
1. Waiting	7	Cash Receipts (v.1)	06/30/2014	29	08/05/2014
2. Waiting	12	Invoice Billings (v.1)	06/30/2014	29	08/05/2014

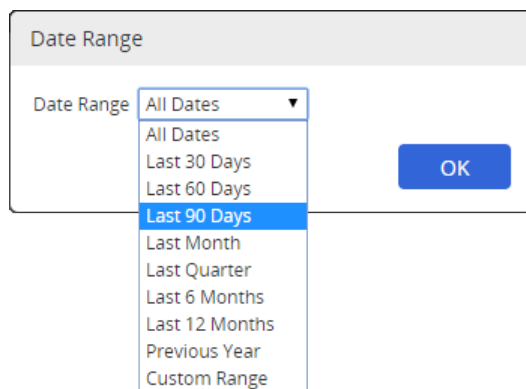
7. (Optional) Click **Task Options**, and then do any of the following:

- In the **Task Options** list, click a single task status (incomplete or complete) or click **Incomplete & Complete Tasks**.



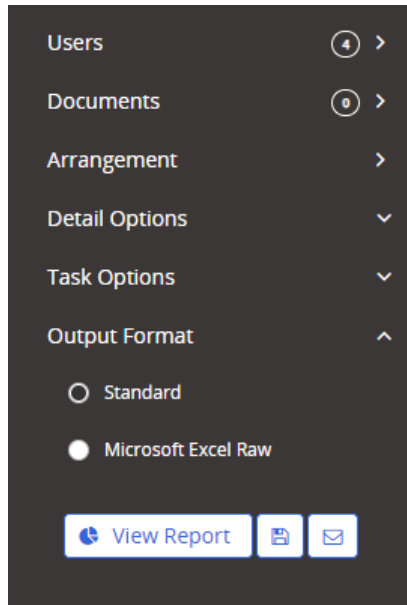
The screenshot shows a configuration panel for 'Task by User Reports'. It includes sections for 'Users' (4 items), 'Documents' (0 items), 'Arrangement', 'Detail Options', and 'Task Options'. Under 'Task Options', there are three radio button options: 'Only Incomplete Tasks', 'Only Complete Tasks' (which is selected), and 'Incomplete & Complete Tasks'. Below these is an 'Output Format' dropdown menu. At the bottom are three buttons: 'View Report' (with a clock icon), a save icon, and an email icon.


- If you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, the **Date** option appears. To show only the selected tasks that fall within a certain date range, click **Date**, select a date range, and then click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.

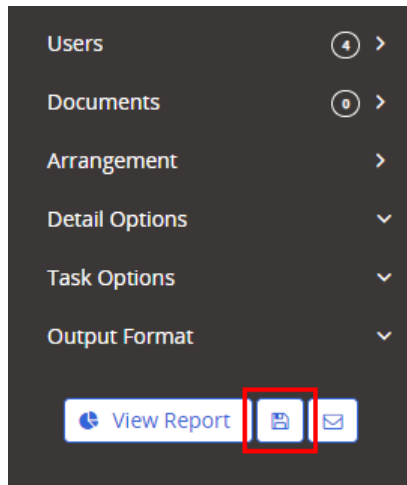


The screenshot shows a 'Date Range' dialog box. It has a 'Date Range' label and a dropdown menu currently showing 'All Dates'. The dropdown menu is open, displaying a list of options: 'All Dates', 'Last 30 Days', 'Last 60 Days', 'Last 90 Days' (which is highlighted), 'Last Month', 'Last Quarter', 'Last 6 Months', 'Last 12 Months', 'Previous Year', and 'Custom Range'. An 'OK' button is located to the right of the dropdown.


8. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.

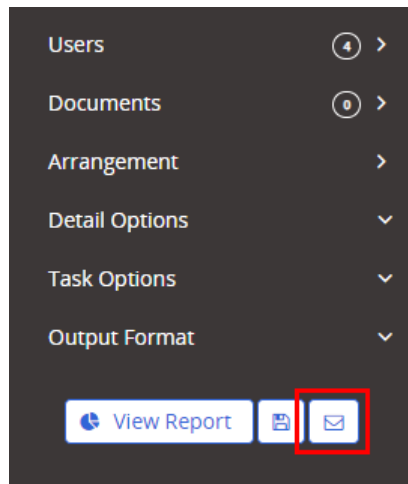


9. (Optional) To save the current user selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

10. (Optional and conditional) Depending on your assigned permissions and email setup, after saving this report you may be able to schedule the summary portion of this report to be automatically generated and emailed to you by clicking  (see [Emailing a Report from a Saved Setup](#) for help).



11. 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 Report](#) for details). If the report contains links, click a link to open that document in PolicyTech or click a user name to open another report specific to that user.

Document Owner - Links to Update Tasks

NAVEX Global All Dates powered by policytech

Pages: 1 Generated By: Johnson, Douglas Generated: 05/26/2016 13:52

Document Owners	Incomplete	Incomplete Tasks Over 30 Days
2	3	3

Users with Tasks

Incomplete	Incomplete Tasks Over 30 Days
1	1

Links to Update (1)

Action	Current Link	Change Reason	Start Date	Duration
1. Waiting	Quiz Taken (v.1)	New Version	08/29/2011	1731

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	First Name	Last Name	Job Title	Unique E-Mail	Site	Depart	Incomplete	Total Tasks	Over 30 Days	Action	Date/Time	Ref #	Title (Version)	Version	Start Date	Days	Task Type	Task		
2	Will	Gatos	Chief Inform	wgatos@mycorp.com	Corporate Admin		1	1	1	Waiting	N/A	118	Performance Evaluation		11/22/2011	946	Approve	No		
3	Douglas	Johnson	Chief Execu	djohnson@mycorp.com	Corporate Admin		1	1	1	Waiting	N/A	139	Training and Tuition Rei		11/21/2011	947	Approve	No		
4	Lynn	Leonard	Director of E6	lleonard@mycorp.com	Educational		4	4	4	Waiting	N/A	173	Physical Inventory Proc		11/22/2011	946	Approve	No		
5	Lynn	Leonard	Director of E6	lleonard@mycorp.com	Educational		4	4	4	Waiting	N/A	177	Shipping and Freight Cl		11/22/2011	946	Approve	No		
6	Lynn	Leonard	Director of E6	lleonard@mycorp.com	Educational		4	4	4	Waiting	N/A	176	Receiving, Inspection at		11/22/2011	946	Approve	No		
7	Lynn	Leonard	Director of E6	lleonard@mycorp.com	Educational		4	4	4	Waiting	N/A	62	Disaster Management F		11/22/2011	946	Approve	No		
8	Tony	Potts	Document C	tpotts@mycorp.com	Corporate Admin		2	2	2	Waiting	N/A	161	Job Description - Direct		11/22/2011	946	Approve	No		

Task by Group Reports

The **Tasks by Group** category includes the following reports:

[Writer Groups](#)

[Reviewer Groups](#)

[Approver Groups](#)

[Assignee Groups](#)

Report: Tasks by Group - Writer Groups


Description

Provides details about the selected writer groups' assigned writing tasks. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:

Manager, Report Manager, Administrator

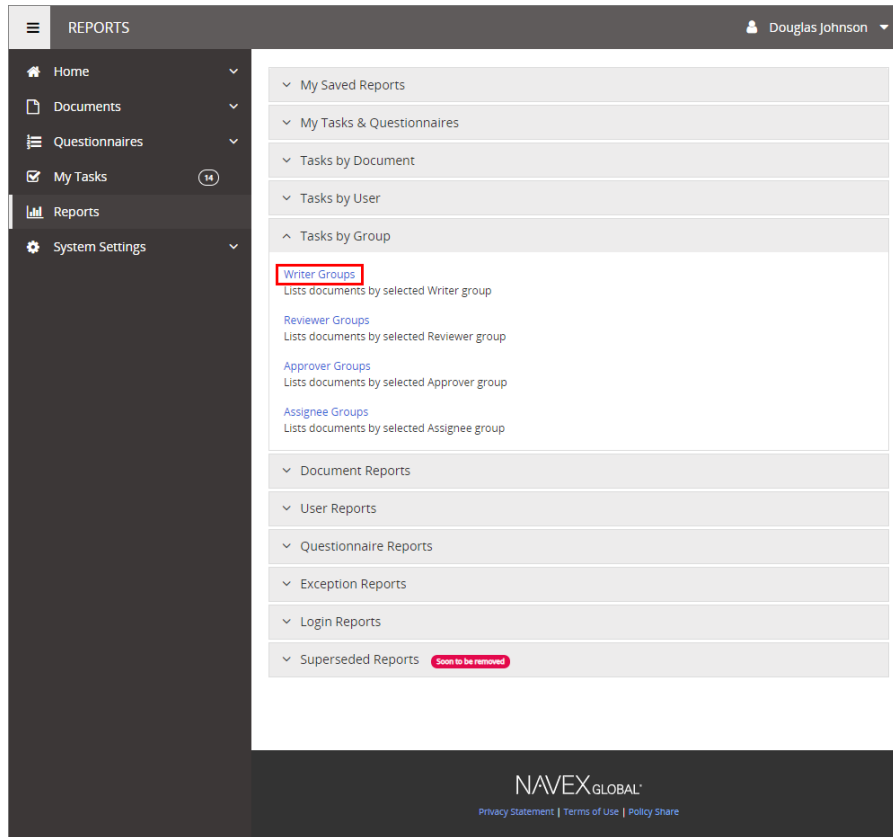
Sample Report:

Incomplete Tasks by Group - Writer Groups								
NAVEX Global	All Dates	powered by 						
Pages: 1	Generated By: Johnson, Douglas	Generated: 2015/05/18 12:01						
Summary								
<table border="1"> <thead> <tr> <th>Writer Groups</th><th>Incomplete</th><th>Incomplete Tasks Over 30 Days</th></tr> </thead> <tbody> <tr> <td>3</td><td>10</td><td>0</td></tr> </tbody> </table>			Writer Groups	Incomplete	Incomplete Tasks Over 30 Days	3	10	0
Writer Groups	Incomplete	Incomplete Tasks Over 30 Days						
3	10	0						
1. Education Writers	Writer Group	Site: Corporate Headquarters						
1. Training Schedule (v.1)		Ref #331						
2. HR Writers	Writer Group	Site: Corporate Headquarters						
1. Travel and Entertainment (v.1)		Ref #332						
3. Policy Writers	Writer Group	Site: Corporate Headquarters						
1. Computer Security Incident Reporting (v.1)		Ref #333						

1/1

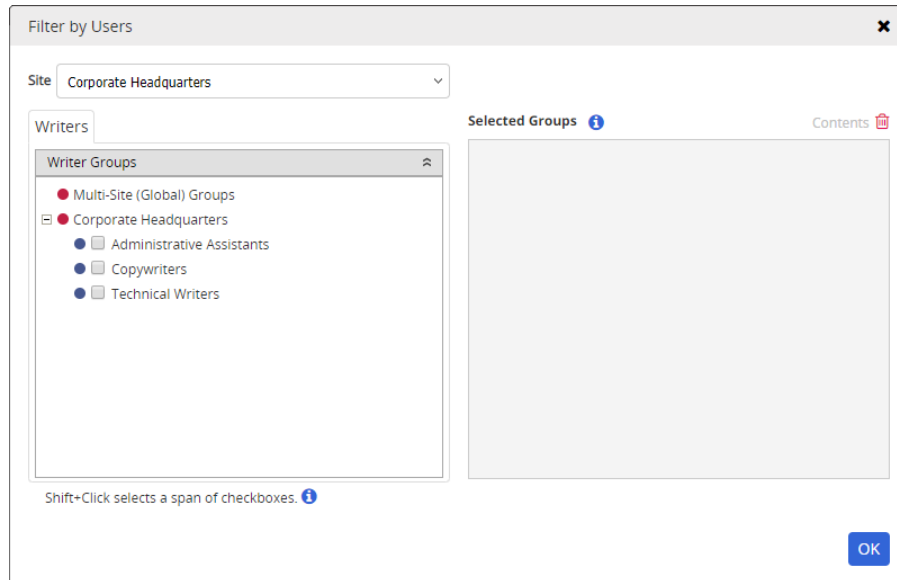
How to Generate

1. Click **Reports**.
2. Click **Tasks by Group**, and then click **Writer Groups**.



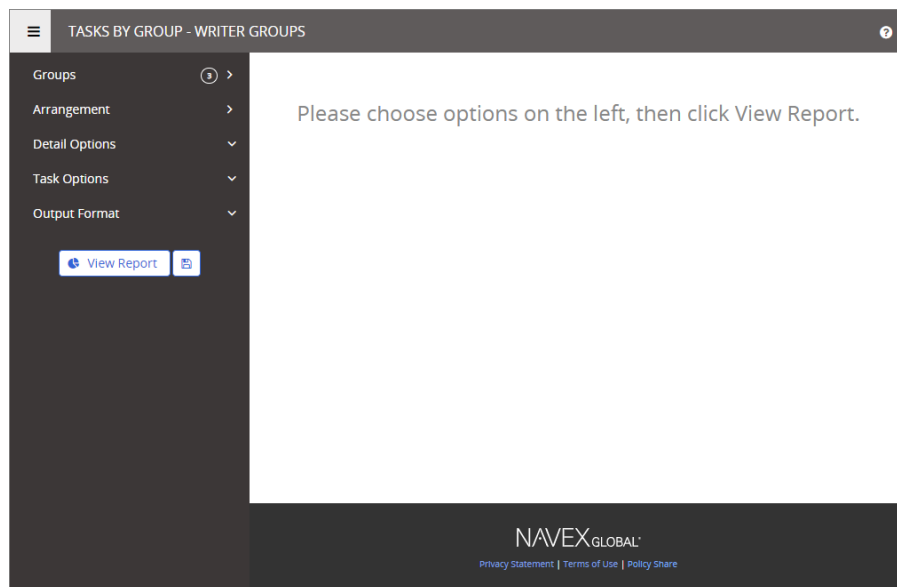
3. Select one or more writer groups.

Important: Be aware that selecting a group in a Tasks by Group report has a different effect than selecting a group in a Tasks by User report. This report lists documents and questionnaires to which specific writer groups have been assigned. Documents/questionnaires assigned only to individual writers will not be included, even if the individual writers happen to be members of the selected writer groups.

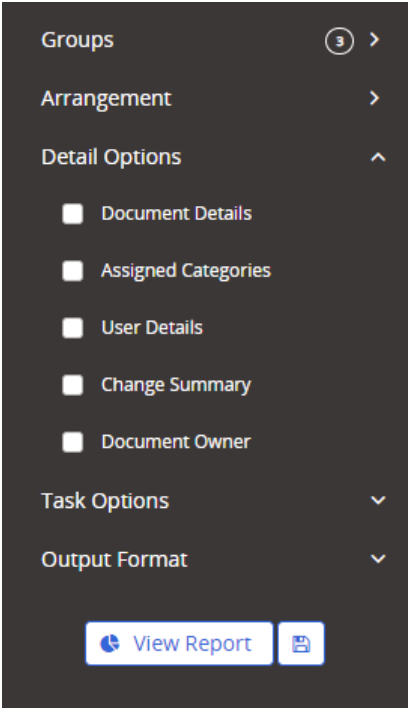


All options available for this report are displayed on the left. Notice that the number of currently selected groups is displayed after the **Groups** option, which you can click anytime to change your user selection.

Note: If you change your group selection after clicking **View Report**, click **View Report** again to refresh the report contents.



4. (Optional) Click **Arrangement**. By default, the group sort order in the report is ascending. To reverse the sort order, click the **Group Name** column header.
5. (Optional) Click **Detail Options**, and then select any of the following:



- **Document Details:** Adds statistics about each document and questionnaire listed in the report.

3. Policy Writers		Writer Group		Site: Corporate Headquarters			
1. Computer Security Incident Reporting (v.1)				Ref #333			
<u>Status</u>	Draft	<u>Current Level</u>	1	<u>Users in Writer Group</u>	5	<u>Publication Date</u>	No Date Set
<u>Date Last Submitted</u>	2015/05/18	<u>Current Cycle</u>	1	<u>Remaining Users in Group</u>	5	<u>Due Date</u>	No Due Date
<u>Total Days in Workflow Step</u>	0	<u>Days in Current Cycle</u>	0	<u>Group Completion</u>	0%		

- **Assigned Categories:** For each document/questionnaire listed in the report, adds a list of assigned categories.

1.	Policy Writers	Writer Group	Site: Corporate Headquarters
1.	Computer Security Incident Reporting (v.1)	Ref #333	
Assigned Categories (1)			
1.	Policies (Document Type/)		

- **User Details:** Adds the list of users in each writer group.

1.	Policy Writers	Writer Group	Site: Corporate Headquarters		
1.	Computer Security Incident Reporting (v.1)				Ref #333
Incomplete Tasks (5)					
	Action	Date/Time	User	Site	Department
1.	Waiting	N/A	Benton, Carol	Corporate Headquarters	Environmental Services
2.	Waiting	N/A	Breen, Darren	Corporate Headquarters	Human Resources
3.	Waiting	N/A	Christenson, Robert	Corporate Headquarters	Technical Services
4.	Waiting	N/A	Gatos, Will	Corporate Headquarters	Administration
5.	Waiting	N/A	Hansen, Tom	Corporate Headquarters	Accounting

- **Change Summary:** For each document/questionnaire listed in the report, shows the comments added by the document owner upon submitting the document/questionnaire for review or approval.

Note: For a document/questionnaire that has not yet been submitted for review or approval, **None** is shown in the **Version Change Summary** area.

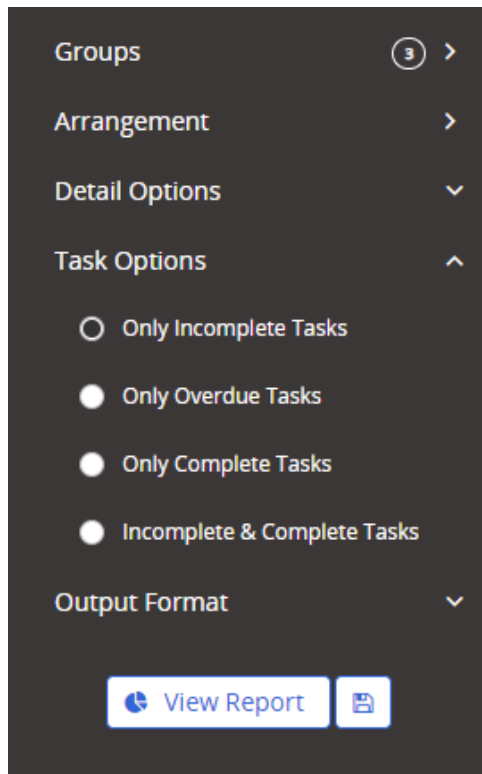
1.	Policy Writers	Writer Group	Site: Corporate Headquarters
1.	Computer Security Incident Reporting (v.2)		Ref #333
Version Change Summary			
New Version			

- **Document Owner:** For each document/questionnaire listed in the report, adds the document owner's name, site, and department.

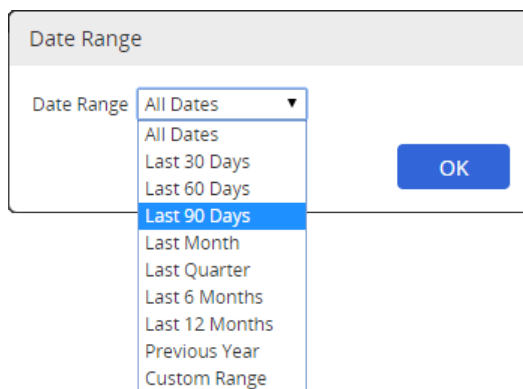
1.	Policy Writers	Writer Group	Site: Corporate Headquarters		
1.	Computer Security Incident Reporting (v.1)	Ref #333	Document Owner: Thomas, Brad (Director of Operations)	Site: Corporate Headquarters	Department: Operations

6. (Optional) Click **Task Options**, and then do any of the following:

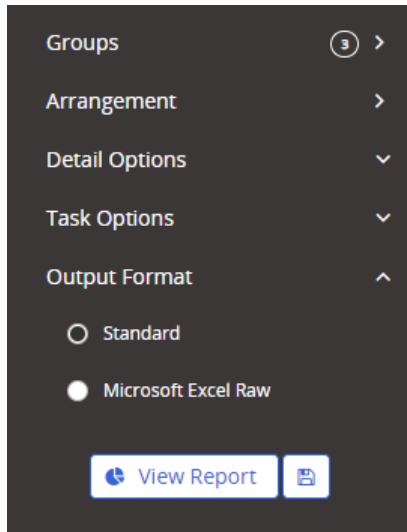
- Click a single task status (overdue, incomplete, or complete) or click **Incomplete & Complete Tasks**.




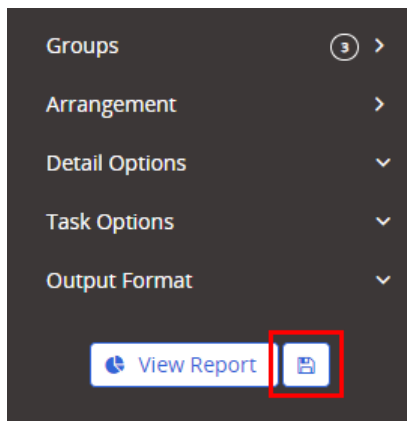
- If you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, the **Date** option appears. To show only the selected tasks that fall within a certain date range, click **Date**, select a date range, and then click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.



7. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.



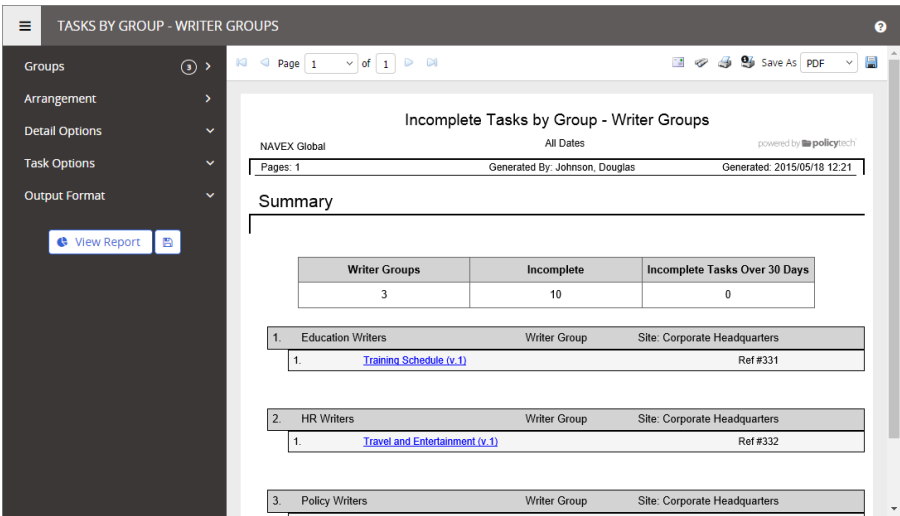
8. (Optional) To save the current group selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

9. 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**, follow the prompts to download and open the Excel file.

	A	B	C	D	E
1	Document ID	Writer Group	Title (Version)	Next Review Date	
2	126	Education Writers	Electronic Mail Policy (v.1)	No Review Date	
3	155	HR Writers	Travel and Entertainment (v.1)	No Review Date	
4	120	Policy Writers	Check-In Form (v.1)	No Review Date	
5	121	Policy Writers	Computer Security Incident Reporting (v.1)	No Review Date	
6	127	Policy Writers	Files and Receipt Management (v.1)	No Review Date	
7	157	Policy Writers	Use of Personal Software (v.1)	No Review Date	
8					

Report: Tasks by Group - Reviewer Groups


Description

Provides details about the selected reviewer groups' assigned reviewing tasks. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:

Manager, Report Manager, Administrator

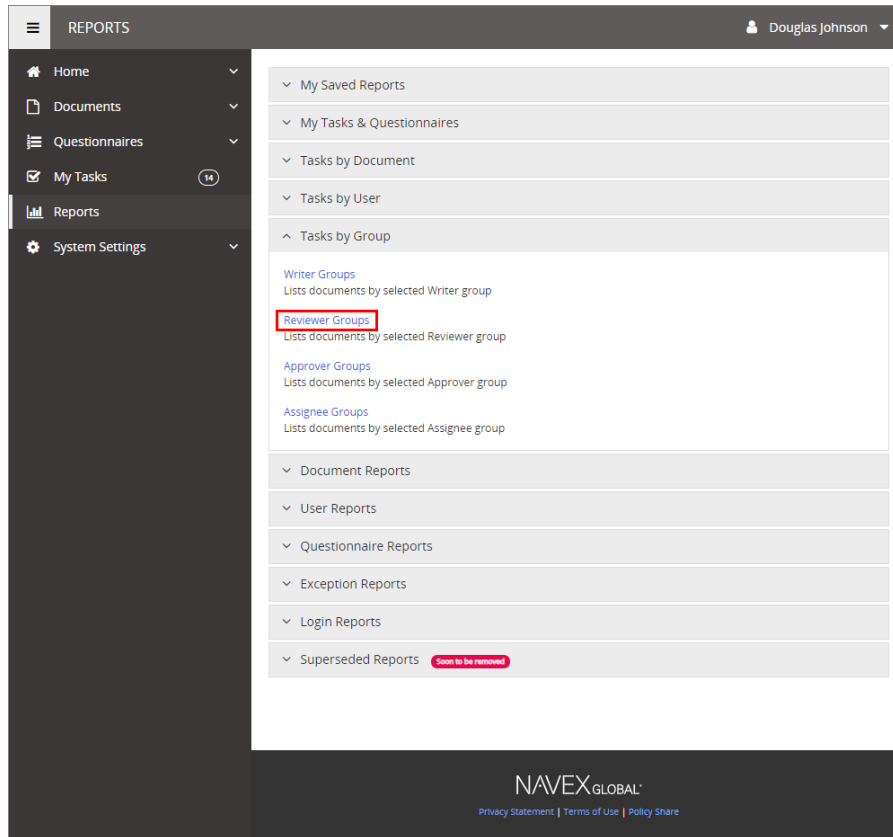
Sample Report:

Incomplete Tasks by Group - Reviewer Groups		
NAVEX Global	All Dates	powered by  policytech
Pages: 1	Generated By: Johnson, Douglas	Generated: 2015/05/18 12:30
Summary		
Reviewer Groups	Incomplete	Incomplete Tasks Over 30 Days
2	19	0
1. Corporate Managers	Reviewer Group	Site: Corporate Headquarters
1. Electronic Mail Policy (v.1)		Ref #126
2. Travel and Entertainment (v.1)		Ref #332
3. Computer Security Incident Reporting (v.2)		Ref #333
2. Technical Reviewers	Reviewer Group	Site: Corporate Headquarters
1. Use of Personal Software (v.1)		Ref #334

1/1

How to Generate

1. Click **Reports**.
2. Click **Tasks by Group**, and then click **Reviewer Groups**.



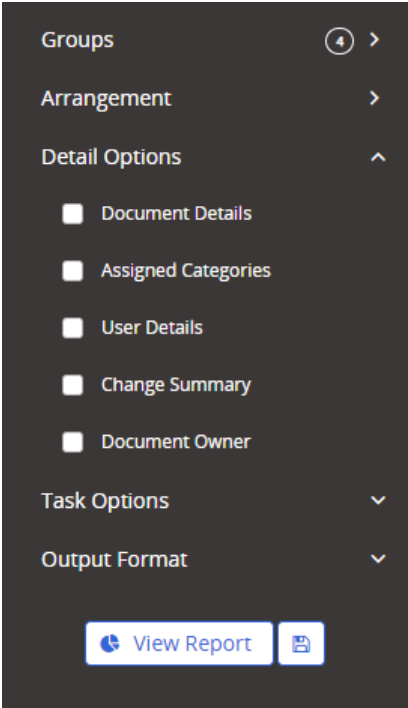
3. Select one or more reviewer groups.

Important: Be aware that selecting a group in a Tasks by Group report has a different effect than selecting a group in a Tasks by User report. This report lists documents and questionnaires to which specific reviewer groups have been assigned. Documents/questionnaires assigned only to individual reviewers will not be included, even if the individual reviewers happen to be members of the selected reviewer groups.

All options available for this report are displayed on the left. Notice that the number of currently selected groups is displayed after the **Groups** option, which you can click anytime to change your user selection.

Note: If you change your group selection after clicking **View Report**, click **View Report** again to refresh the report contents.

4. (Optional) Click **Arrangement**. By default, the group sort order in the report is ascending. To reverse the sort order, click the **Group Name** column header.
5. (Optional) Click **Detail Options**, and then select any of the following:



- **Document Details:** Adds statistics about each document and questionnaire listed in the report.

1. Corporate Managers		Reviewer Group		Site: Corporate Headquarters	
1. Electronic Mail Policy (v.1)		Ref #126			
<u>Status</u>	In Review	<u>Current Level</u> 1	<u>Users in Reviewer Group</u> 5	<u>Publication Date</u>	No Date Set
<u>Date Last Submitted</u>	2015/05/18	<u>Current Cycle</u> 1	<u>Remaining Users in Group</u> 5	<u>Due Date</u>	No Due Date
<u>Total Days in Workflow Step</u>	0	<u>Days in Current Cycle</u> 0	<u>Group Completion</u> 0%		

- **Assigned Categories:** For each document/questionnaire listed in the report, adds a list of assigned categories.

1.	Corporate Managers	Reviewer Group	Site: Corporate Headquarters
1.	Computer Security Incident Reporting (v.1)		Ref #121
Assigned Categories (1)			
1.	Policies (Document Type)		

- **User Details:** Adds the list of users in each reviewer group.

1.	Corporate Managers	Reviewer Group	Site: Corporate Headquarters		
1.	Computer Security Incident Reporting (v.1)		Ref #121		
Incomplete Tasks (3)					
	Action	Date/Time	User	Site	Department
1.	Waiting	N/A	Breen, Darren	Corporate Headquarters	Human Resources
2.	Waiting	N/A	Hansen, Tom	Corporate Headquarters	Accounting
3.	Waiting	N/A	Wright, Fred	Corporate Headquarters	Software Development

- **Change Summary:** For each document/questionnaire listed in the report, shows the comments added by the document owner upon submitting the document for review or approval.

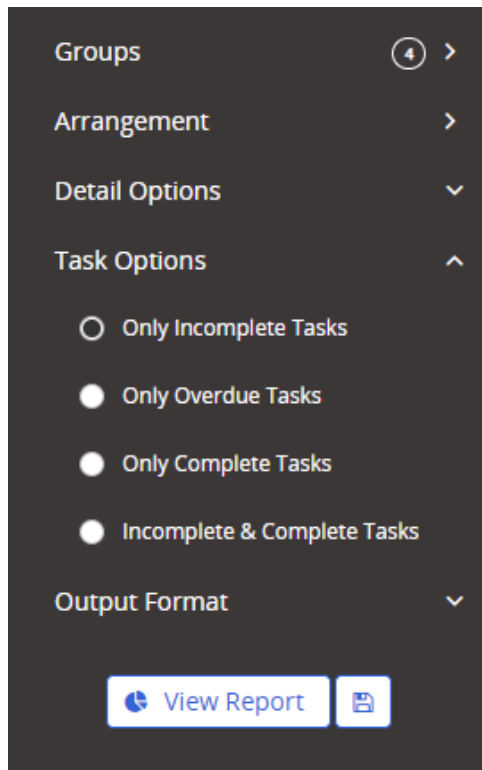
1.	Corporate Managers	Reviewer Group	Site: Corporate Headquarters
1.	Computer Security Incident Reporting (v.1)	Ref #121	
Version Change Summary			
New Document			

- **Document Owner:** For each document/questionnaire listed in the report, adds the document owner's name, site, and department.

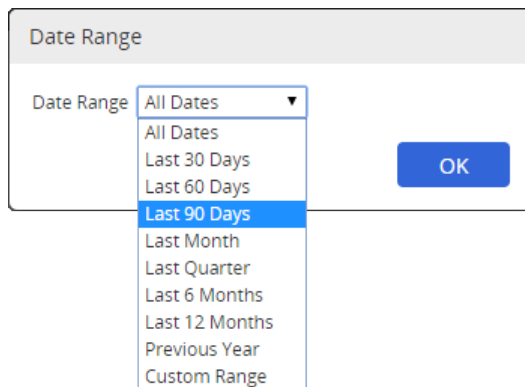
1.	Corporate Managers	Reviewer Group	Site: Corporate Headquarters
1.	Computer Security Incident Reporting (v.1)	Ref #121	Document Owner: Howard, Susan (Document, Control Administrator)
			Site: Corporate Headquarters Department: Administration

6. (Optional) Click **Task Options**, and then do any of the following:

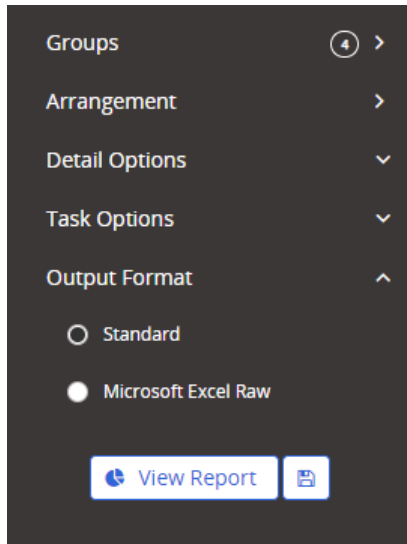
- Click a single task status (overdue, incomplete, or complete) or click **Incomplete & Complete Tasks**.




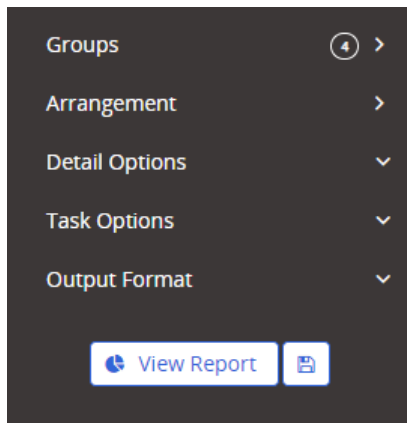
- If you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, the **Date** option appears. To show only the selected tasks that fall within a certain date range, click **Date**, select a date range, and then click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.



7. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.



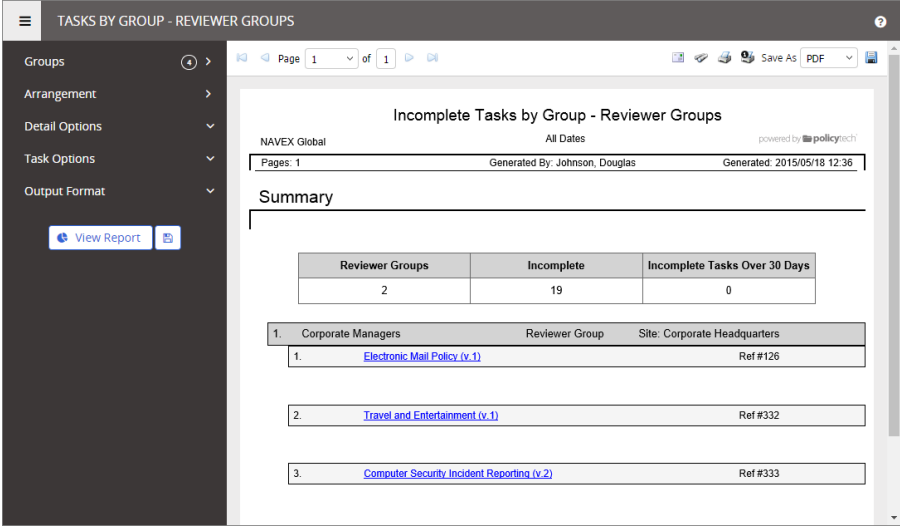
8. (Optional) To save the current group selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

9. 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**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F
1	Document ID	Reviewer Group	Title (Version)	Document History	Next Review Date	
2	121	Corporate Managers	Computer Security Incident Reporting (v.1)	New Document	No Review Date	
3	126	Corporate Managers	Electronic Mail Policy (v.1)	New Document	No Review Date	
4	155	Corporate Managers	Travel and Entertainment (v.1)	New Document	No Review Date	
5						

Report: Tasks by Group - Approver Groups


Description

Provides details about the selected approver groups' assigned approval tasks. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:

Manager, Report Manager, Administrator

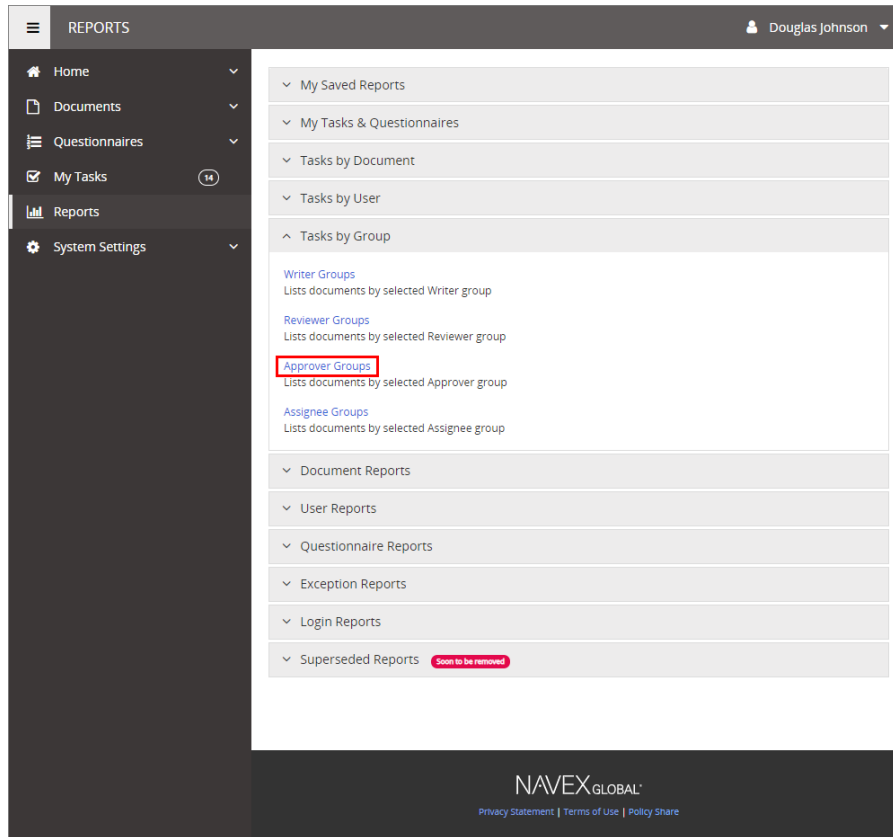
Sample Report:

Incomplete Tasks by Group - Approver Groups		
NAVEX Global	All Dates	powered by  policytech
Pages: 1	Generated By: Johnson, Douglas	Generated: 2015/05/18 12:40
Summary		
Approver Groups	Incomplete	Incomplete Tasks Over 30 Days
1	16	0
1. Executives	Approver Group	Site: Corporate Headquarters
1.	Electronic Mail Policy (v.1)	Ref #126
2.	Travel and Entertainment (v.1)	Ref #332
3.	Computer Security Incident Reporting (v.2)	Ref #333
4.	Use of Personal Software (v.1)	Ref #334

1/1

How to Generate

1. Click **Reports**.
2. Click **Tasks by Group**, and then click **Approver Groups**.



3. Select one or more approver groups.

Important: Be aware that selecting a group in a Tasks by Group report has a different effect than selecting a group in a Tasks by User report. This report lists documents and questionnaires to which specific approver groups have been assigned. Documents/questionnaires assigned only to individual approvers will not be included, even if the individual approvers happen to be members of the selected approver groups.

Filter by Users

Site: Corporate Headquarters

Approvers

- Multi-Site (Global) Groups
- Corporate Headquarters

Selected Groups

- Executives
- Managers

Contents

Shift+Click selects a span of checkboxes.

OK

All options available for this report are displayed on the left. Notice that the number of currently selected groups is displayed after the **Groups** option, which you can click anytime to change your user selection.

Note: If you change your group selection after clicking **View Report**, click **View Report** again to refresh the report contents.

TASKS BY GROUP - APPROVER GROUPS

Groups (2)

Arrangement

Detail Options

Task Options

Output Format

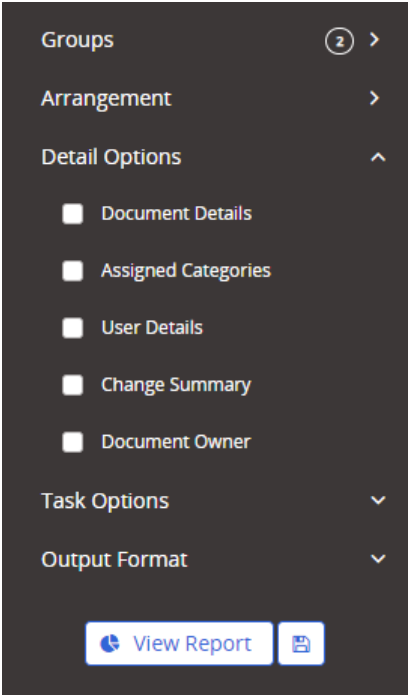
View Report

Please choose options on the left, then click View Report.

NAVEX GLOBAL

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- (Optional) Click **Arrangement**. By default, the group sort order in the report is ascending. To reverse the sort order, click the **Group Name** column header.
- (Optional) Click **Detail Options**, and then select any of the following:



- **Document Details:** Adds statistics about each document and questionnaire listed in the report.

1.	Executives	Approver Group		Site: Corporate Headquarters			
1.	Computer Security Incident Reporting (v.1)				Ref #121		
<u>Status</u>	In Approval	<u>Current Level</u>	1	<u>Users in Approver Group</u>	4	<u>Publication Date</u>	No Date Set
<u>Date Last Submitted</u>	2015/03/17	<u>Current Cycle</u>	1	<u>Remaining Users in Group</u>	4	<u>Due Date</u>	No Due Date
<u>Total Days in Workflow Step</u>	0	<u>Days in Current Cycle</u>	0	<u>Group Completion</u>	0%		

- **Assigned Categories:** For each document/questionnaire listed in the report, adds a list of assigned categories.

1.	Executives	Approver Group	Site: Corporate Headquarters
1.	Computer Security Incident Reporting (v.1)		Ref #121
Assigned Categories (1)			
1.	Policies (Document Type)		

- **User Details:** Adds the list of users in each approver group.

1.	Executives	Approver Group	Site: Corporate Headquarters		
1.	Computer Security Incident Reporting (v.1)		Ref #121		
Incomplete Tasks (4)					
	Action	Date/Time	User	Site	Department
1.	Waiting	N/A	Gatos, Will	Corporate Headquarters	Administration
2.	Waiting	N/A	Johnson, Douglas	Corporate Headquarters	Administration
3.	Waiting	N/A	Jones, Anne	Corporate Headquarters	Administration
4.	Waiting	N/A	Monson, Teresa	Corporate Headquarters	Administration

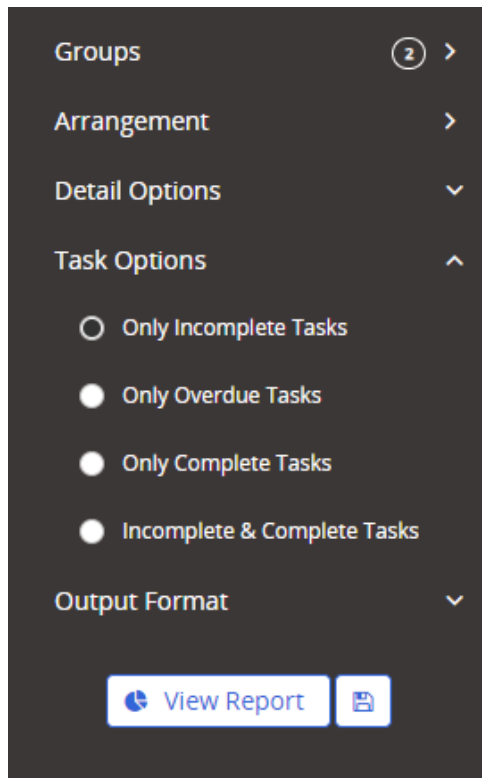
- **Change Summary:** For each document/questionnaire listed in the report, shows the comments added by the document owner upon submitting the document for review or approval.

1.	Executives	Approver Group	Site: Corporate Headquarters
1.	Computer Security Incident Reporting (v.1)		Ref #121
<div>Version Change Summary</div> <div>New Document</div>			

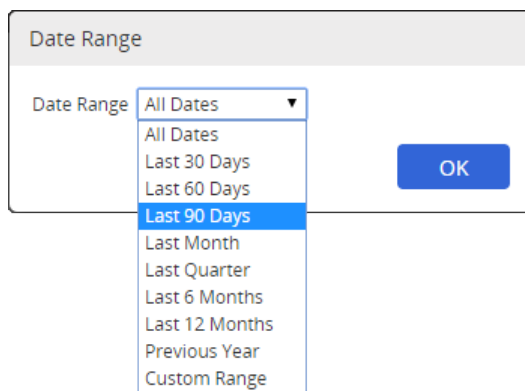
- **Document Owner:** For each document/questionnaire listed in the report, adds the document owner's name, site, and department.

1. Executives	Approver Group	Site: Corporate Headquarters			
1. Computer Security Incident Reporting (v.1)	Ref #121	<table> <tr> <td>Document Owner: Howard, Susan (Document, Control Administrator)</td><td>Site: Corporate Headquarters</td><td>Department: Administration</td></tr> </table>	Document Owner: Howard, Susan (Document, Control Administrator)	Site: Corporate Headquarters	Department: Administration
Document Owner: Howard, Susan (Document, Control Administrator)	Site: Corporate Headquarters	Department: Administration			

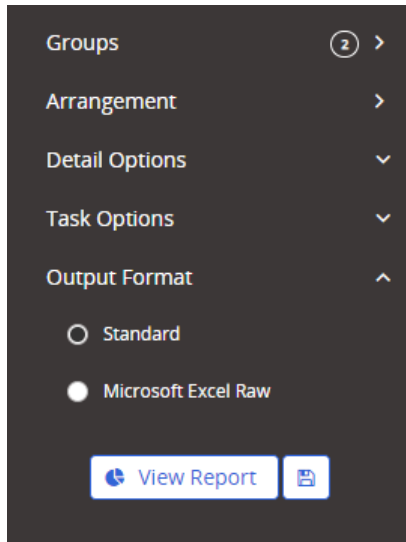
- (Optional) Click **Task Options**, and then do any of the following:
 - Click a single task status (overdue, incomplete, or complete) or click **Incomplete & Complete Tasks**.




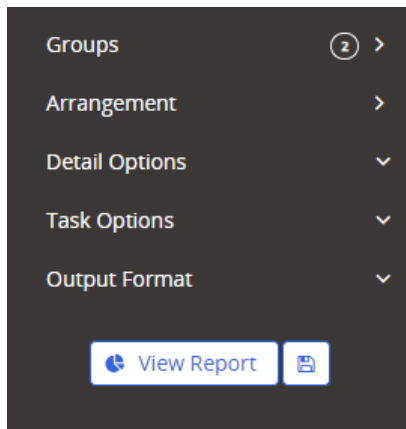
- If you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, the **Date** option appears. To show only the selected tasks that fall within a certain date range, click **Date**, select a date range, and then click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.



7. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.



8. (Optional) To save the current group selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

9. 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.

Tasks by Group - Approver Groups

NAVEX Global All Dates powered by policytech

Pages: 1 Generated By: Johnson, Douglas Generated: 2015/05/18 12:47

Summary

Approver Groups	Incomplete	Incomplete Tasks Over 30 Days
1	16	0

1. Executives Approver Group Site: Corporate Headquarters

1.	Electronic Mail Policy (v.1)	Ref #126
2.	Travel and Entertainment (v.1)	Ref #332
3.	Computer Security Incident Reporting (v.2)	Ref #333

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F
1	Document ID	Approver Group	Title (Version)	Document History	Next Review Date	
2	121	Executives	Computer Security Incident Reporting (v.1)	New Document	No Review Date	
3	126	Executives	Electronic Mail Policy (v.1)	New Document	No Review Date	
4	155	Executives	Travel and Entertainment (v.1)	New Document	No Review Date	
5	157	Executives	Use of Personal Software (v.1)	New Document	No Review Date	
6						

Report: Tasks by Group - Reader Groups


Description

Provides details about the selected reader groups' assigned reading tasks. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:

Manager, Report Manager, Administrator

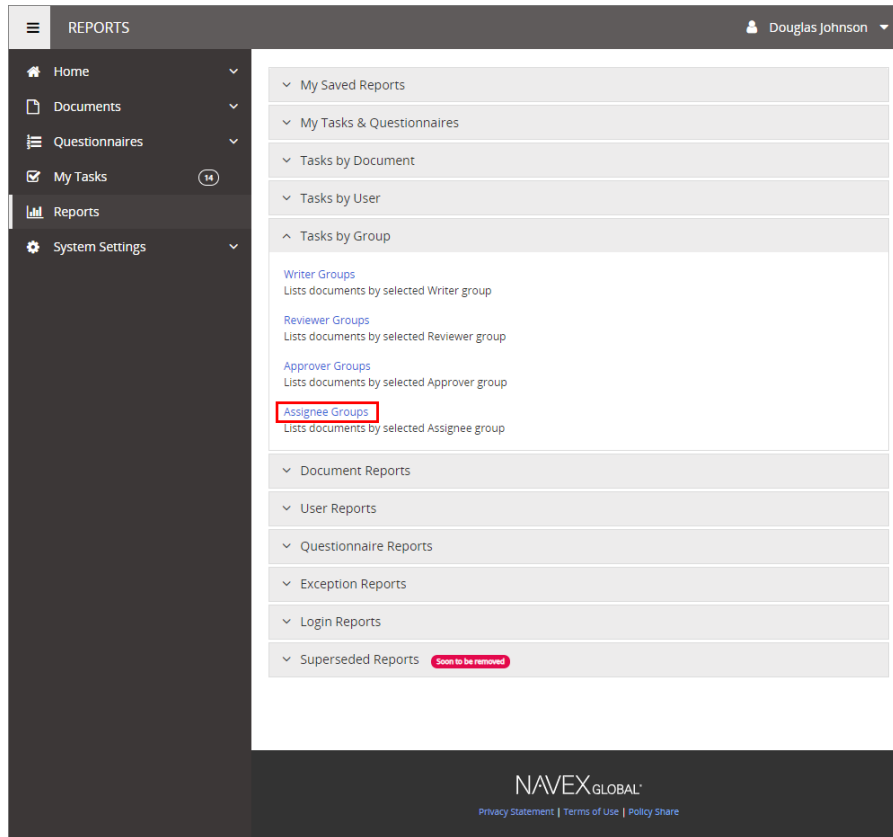
Sample Report:

Incomplete Tasks by Group - Reader Groups								
NAVEX Global	All Dates	powered by  policytech						
Pages: 1	Generated By: Johnson, Douglas	Generated: 2015/05/18 12:54						
Summary								
<table border="1"> <thead> <tr> <th>Groups</th><th>Incomplete</th><th>Incomplete Tasks Over 30 Days</th></tr> </thead> <tbody> <tr> <td>3</td><td>33</td><td>0</td></tr> </tbody> </table>			Groups	Incomplete	Incomplete Tasks Over 30 Days	3	33	0
Groups	Incomplete	Incomplete Tasks Over 30 Days						
3	33	0						
1.	Accounting Readers	Reader Group Site: Corporate Headquarters						
1.	Travel and Entertainment (v.1)	Ref #332						
2.	Computer Security Incident Reporting (v.2)	Ref #333						
3.	Use of Personal Software (v.1)	Ref #334						
2.	HR Readers	Reader Group Site: Corporate Headquarters						
1.	Electronic Mail Policy (v.1)	Ref #126						
2.	Travel and Entertainment (v.1)	Ref #332						
3.	Computer Security Incident Reporting (v.2)	Ref #333						
4.	Use of Personal Software (v.1)	Ref #334						
3.	Software Development Readers	Reader Group Site: Corporate Headquarters						
1.	Computer Security Incident Reporting (v.2)	Ref #333						

1/1

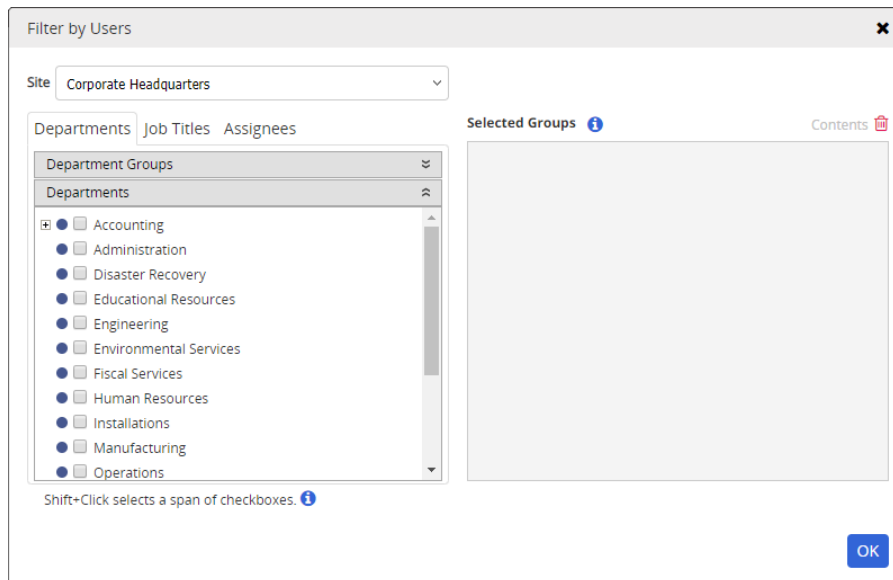
How to Generate

1. Click **Reports**.
2. Click **Tasks by Group**, and then click **Reader Groups**.



3. Do any of the following:

- In the **Departments** tab, click the **Departments** or **Department Groups** bar, and then select one or more items.



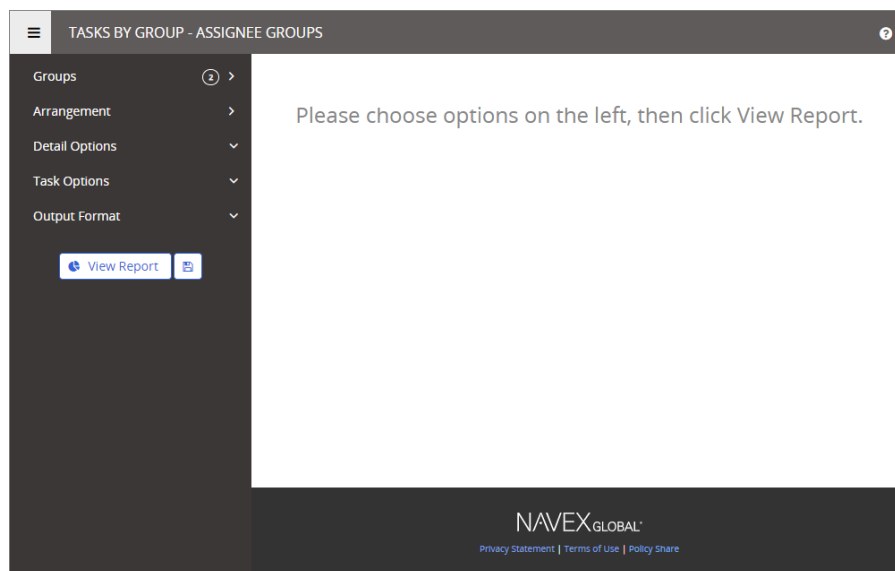
- Click the **Job Titles** tab, click the **Job Titles** or **Job Title Groups** bar, and then select one or more items.
- Click the **Readers** tab, and then select one or more reader groups.

Important:

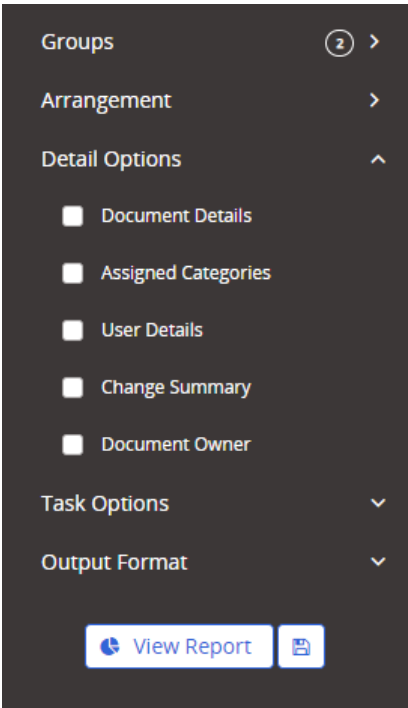
- Be aware that selecting a group in a Tasks by Group report has a different effect than selecting a group in a Tasks by User report. This report lists documents and questionnaires to which specific reader groups have been assigned. Documents/questionnaires assigned only to individual readers will not be included, even if the individual readers happen to be members of the selected reader groups.
- Unlike when selecting writers, reviewers, and approvers, when selecting readers, you can also select departments, department groups, job titles, and job title groups. That is because each of these entities is treated as a group when making reader assignments, whereas selecting any of these entities for writers, reviewers, or approvers simply facilitates adding multiple users at once.

All options available for this report are displayed on the left. Notice that the number of currently selected groups is displayed after the **Groups** option, which you can click anytime to change your user selection.

Note: If you change your group selection after clicking **View Report**, click **View Report** again to refresh the report contents.



4. (Optional) Click **Arrangement**. By default, the group sort order in the report is ascending. To reverse the sort order, click the **Group Name** column header.
5. (Optional) Click **Detail Options**, and then select any of the following:



- **Document Details:** Adds statistics about each document and questionnaire listed in the report.

1.	Accounting Readers	Reader Group	Site: Corporate Headquarters
1.	Computer Security Incident Reporting (v.1)		Ref #121
Status	Approved	Users in Reader Group	4
Date Last Submitted	2015/03/17	Remaining Users in Group	4
Total Days in Workflow Step	0	Group Completion	0%
		Publication Date	2015/03/17
		Due Date	No Due Date

- **Assigned Categories:** For each document/questionnaire listed in the report, adds a list of assigned categories.

1.	Accounting Readers	Reader Group	Site: Corporate Headquarters
1.	Computer Security Incident Reporting (v.1)		Ref #121
Assigned Categories (1)			
1.	Policies (Document Type)		

- **User Details:** Adds the list of users in each reader group.

1.	Accounting Readers	Reader Group	Site: Corporate Headquarters		
1.	Computer Security Incident Reporting (v.1)			Ref #121	
Incomplete Tasks (4)					
	Action	Date/Time	User	Site	Department
1.	Incomplete	N/A	Cash, Jordon	Corporate Headquarters	Accounting
2.	Incomplete	N/A	Gifford, Tawna	Corporate Headquarters	Accounting
3.	Incomplete	N/A	Hansen, Tom	Corporate Headquarters	Accounting
4.	Incomplete	N/A	Woo, Josh	Corporate Headquarters	Accounting

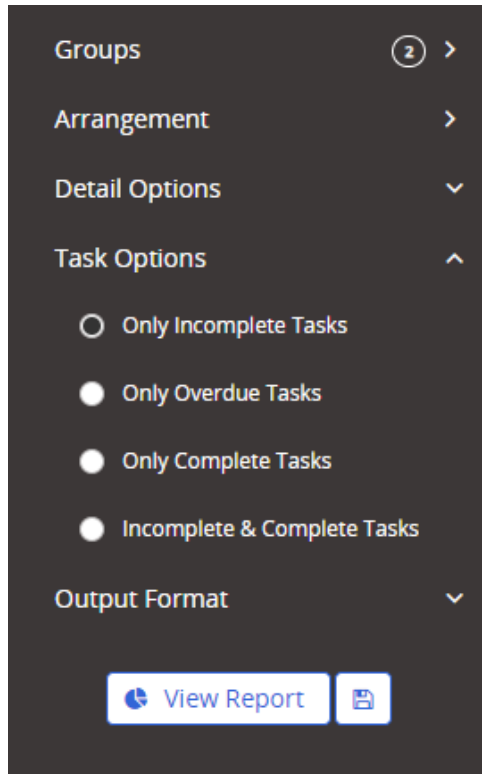
- **Change Summary:** For each document/questionnaire listed in the report, shows the comments added by the document owner upon submitting the document for review or approval.

1.	Accounting Readers	Reader Group	Site: Corporate Headquarters
1.	Computer Security Incident Reporting (v.1)	Ref #121	
Version Change Summary			
New Document			

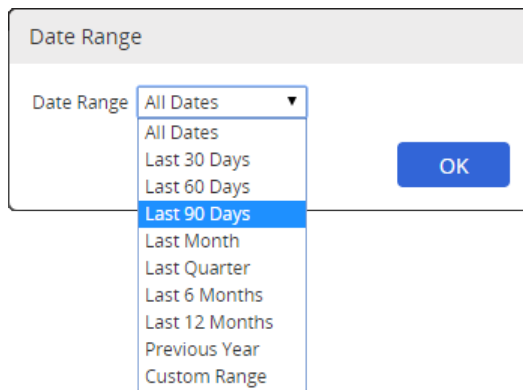
- **Document Owner:** For each document/questionnaire listed in the report, adds the document owner's name, site, and department.

1.	Accounting Readers	Reader Group	Site: Corporate Headquarters		
1.	Computer Security Incident Reporting (v.1)	Ref #121	Document Owner: Howard, Susan (Document, Control Administrator)	Site: Corporate Headquarters	Department: Administration

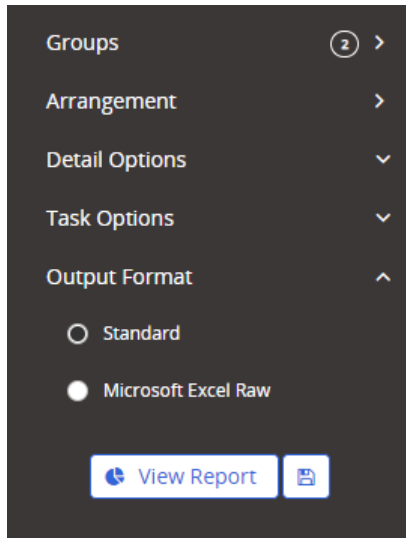
6. (Optional) Click **Task Options**, and then do any of the following:
- Click a single task status (overdue, incomplete, or complete) or click **Incomplete & Complete Tasks**.




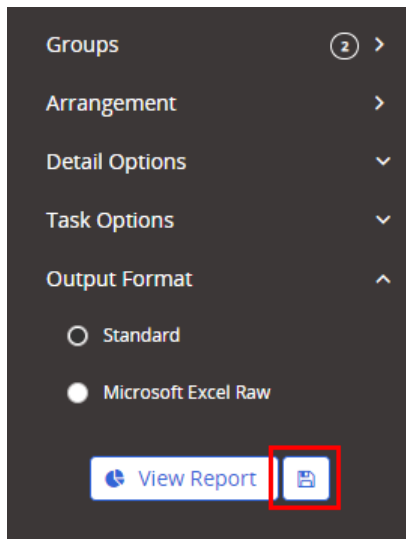
- If you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, the **Date** option appears. To show only the selected tasks that fall within a certain date range, click **Date**, select a date range, and then click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.



7. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.



8. (Optional) To save the current group selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

9. 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.

TASKS BY GROUP - ASSIGNEE GROUPS

Groups

Arrangement

Detail Options

Task Options

Output Format

Standard

Microsoft Excel Raw

View Report

Page 1 of 1

Save As PDF

Incomplete Tasks by Group - Reader Groups

NAVEX GlobalAll Datespowered by policytech

Pages: 2Generated By: Johnson, DouglasGenerated: 05/27/2016 08:00

Summary

Groups	Incomplete	Incomplete Tasks Over 30 Days
3	269	204

1. Accounting

Department GroupSite: Corporate Headquarters

1. [Account Collections Form \(v.1\)](#)Ref #1

2. [Accounts Payable and Cash Distribution \(v.1\)](#)Ref #2

3. [Cash Drawers \(v.1\)](#)Ref #216

4. [Chart of Accounts \(v.1\)](#)Ref #235

5. [Invoice Billing \(v.1\)](#)Ref #237

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F
1	Document ID	Reader Group	Title (Version)	Document History	Next Review Date	
2	121	Accounting Readers	Computer Security Incident Reporting (v.1)	New Document	2015/03/17	
3	155	Accounting Readers	Travel and Entertainment (v.1)	New Document	2015/03/17	
4	157	Accounting Readers	Use of Personal Software (v.1)	New Document	2015/03/17	
5	121	HR Readers	Computer Security Incident Reporting (v.1)	New Document	2015/03/17	
6	126	HR Readers	Electronic Mail Policy (v.1)	New Document	2015/03/17	
7	155	HR Readers	Travel and Entertainment (v.1)	New Document	2015/03/17	
8	157	HR Readers	Use of Personal Software (v.1)	New Document	2015/03/17	
9	0	Operations				
10						

Document Reports

The **Document Reports** category includes the following:

[Document Assignments by Title](#)

[Document Count by Owner](#)

[Documents Accessed](#)

[Document Duration in Workflow](#)

[Linked Documents](#)

[Documents within Date Range](#)

[Documents Approved as of a Specific Date](#)

[Change Summary with Version History and Documents Replaced](#)

[Print Multiple Documents](#)

[Email Bounce Backs by Document](#)

Report: Document Assignments by Title

Description


For the selected documents or questionnaires, shows all user assignments along with what role each user performs.

Available to users with the following roles or permissions:

Document Owner, Proxy Author, Report Manager, Administrator

Sample Report:

Document Assignments by Title - Draft

Delta Regional Medical Center powered by  policytech

Pages: 2	Generated By: Susan Howard	Generated: 04/17/2013 1:02 PM
----------	----------------------------	-------------------------------

1. Bad NSF Checks (v.1)
Ref. # 316

Assigned Users (3)

#	<u>User</u>	<u>Assignment Type</u>
1.	Johnson, Douglas (Chief Executive Officer)	Approver
2.	Hansen, Tom (Accounting Manager)	Document Owner
3.	Jones, Anne (Chief Finance Officer)	Reviewer

2. Invoice Billings (v.1)
Ref. # 52

Assigned Users (5)

#	<u>User</u>	<u>Assignment Type</u>
1.	Jones, Anne (Chief Finance Officer)	Approver
2.	Hansen, Tom (Accounting Manager)	Document Owner
3.	Hansen, Tom (Accounting Manager)	Reviewer
4.	Gifford, Tawna (Accounts Receivable Clerk)	Writer
5.	Woo, Josh (Accountant)	Writer

3. Performance Evaluation (v.1)
Ref. # 296

Assigned Users (2)

#	<u>User</u>	<u>Assignment Type</u>
1.	Johnson, Douglas (Chief Executive Officer)	Approver
2.	Jones, Anne (Chief Finance Officer)	Document Owner

4. Captilization (v.3)
Ref. # 67

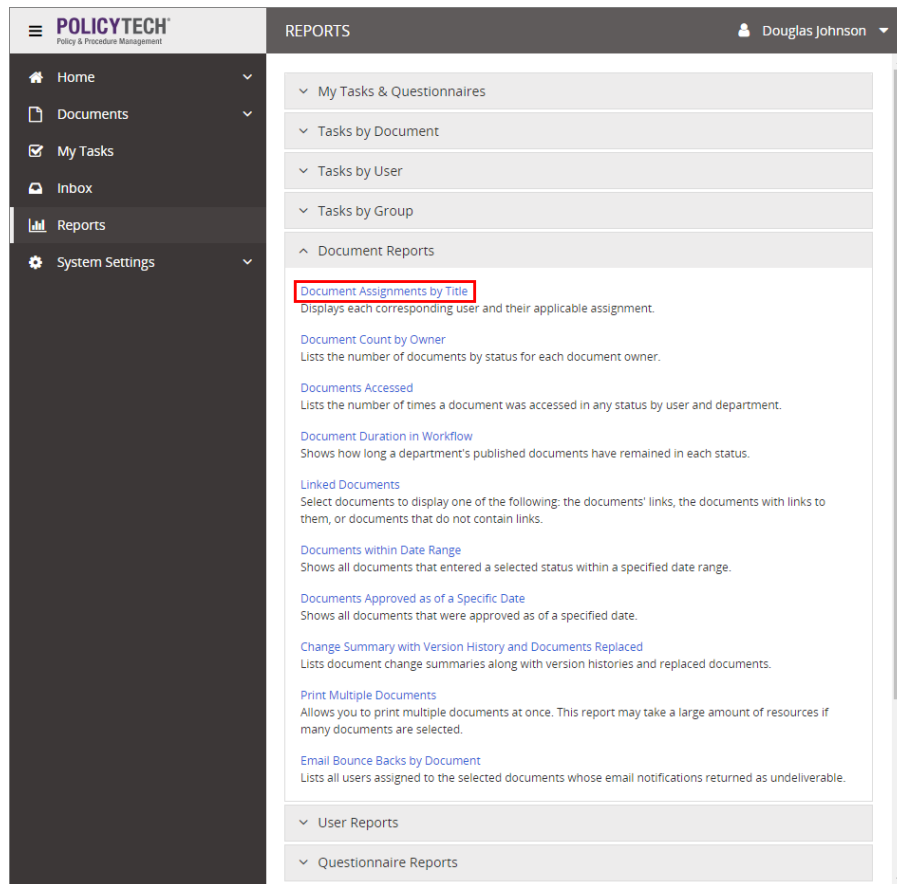
Assigned Users (3)

#	<u>User</u>	<u>Assignment Type</u>
1.	Johnson, Douglas (Chief Executive Officer)	Approver
2.	Hansen, Tom (Accounting Manager)	Document Owner
3.	Howard, Susan (Document Control Administrator)	Writer

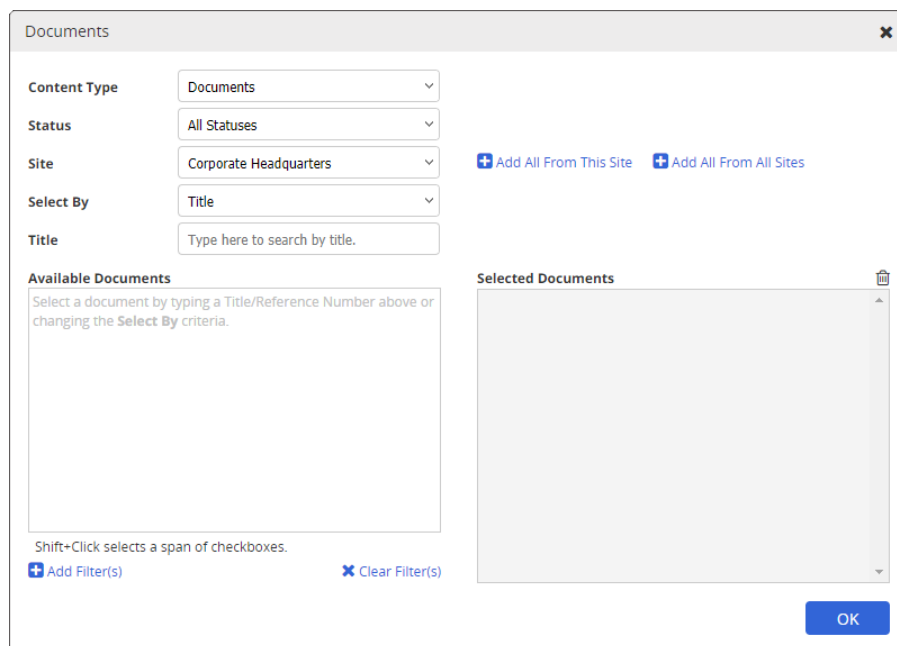
1/2

How to Generate

1. Click **Reports**.
2. Click **Document Reports**, and then click **Document Assignments by Title**.

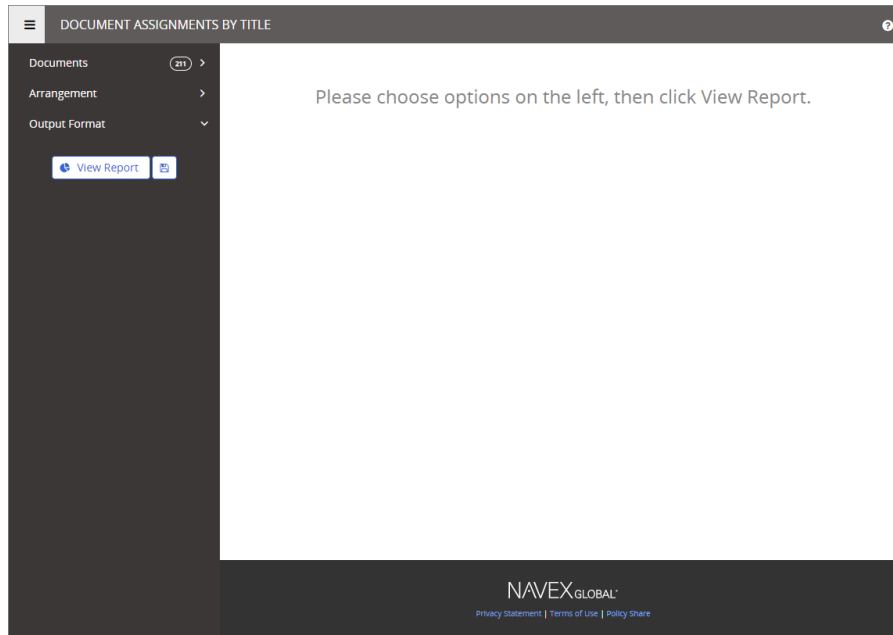


3. Select documents or questionnaires to include in the report (see [Selecting Documents](#) for help), and then click **OK**.



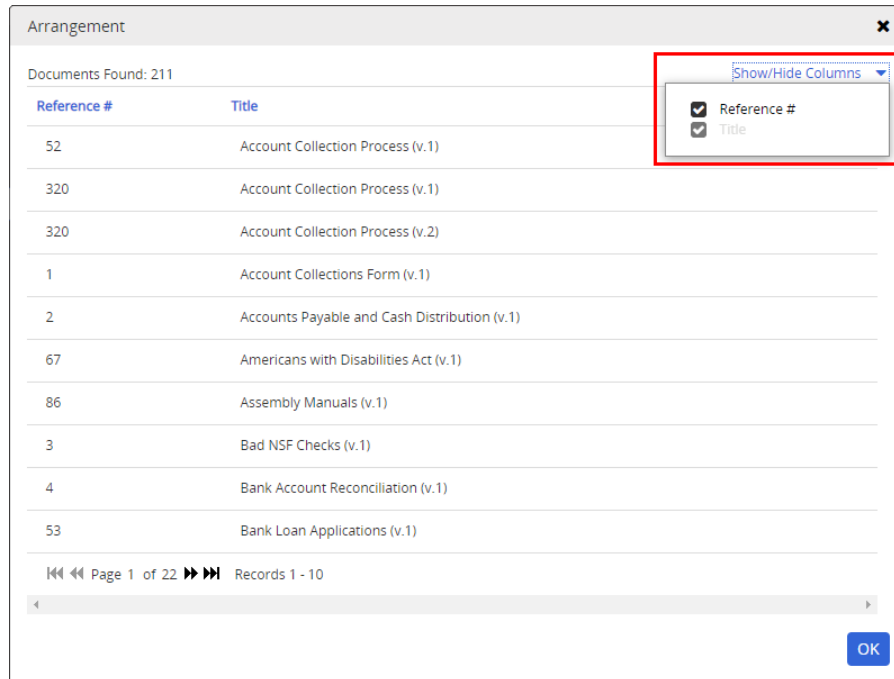
All options available for this report are displayed on the left. Notice that the number of currently selected documents/questionnaires is displayed after the **Documents** option, which you can click anytime to change your document/questionnaire selection.

Note: If you change your document/questionnaire selection after clicking **View Report**, click **View Report** again to refresh the report contents.



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.



Arrangement

Documents Found: 211

Show/Hide Columns

- ☒ Reference #
- ☒ Title

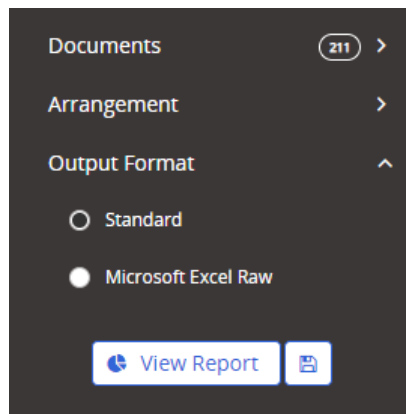
Reference #	Title
52	Account Collection Process (v.1)
320	Account Collection Process (v.1)
320	Account Collection Process (v.2)
1	Account Collections Form (v.1)
2	Accounts Payable and Cash Distribution (v.1)
67	Americans with Disabilities Act (v.1)
86	Assembly Manuals (v.1)
3	Bad NSF Checks (v.1)
4	Bank Account Reconciliation (v.1)
53	Bank Loan Applications (v.1)

Page 1 of 22 Records 1 - 10

OK

- 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. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.



Documents 211 >


Arrangement >

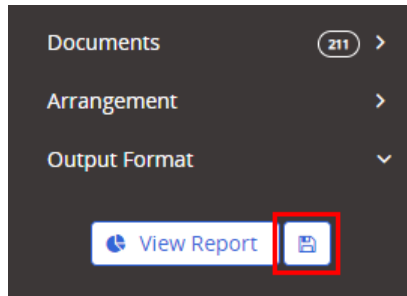
Output Format ^

☐ Standard

☒ Microsoft Excel Raw

View Report

6. (Optional) To save the current document/questionnaire selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

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.

Document Assignments by Title - All Statuses

NAVEX Global | Pages: 36 | Generated By: Douglas Johnson | Generated: 10/28/2018 5:01 PM

1. Account Collection Process (v.1) Ref. # 52

Assigned Users (2)

User	Assignment Type
1. Johnson, Douglas (Chief Executive Officer)	Approver
2. Hansen, Tom (Accounting Manager)	Document Owner

2. Account Collection Process (v.1) Ref. # 320

Assigned Users (4)

User	Assignment Type
1. Johnson, Douglas (Chief Executive Officer)	Approver
2. Hansen, Tom (Accounting Manager)	Document Owner
3. Benton, Carol (Manager)	Reviewer
4. Driggs, Shiela (Director of Finance)	Writer

3. Account Collection Process (v.2) Ref. # 320

Assigned Users (4)

User	Assignment Type
1. Johnson, Douglas (Chief Executive Officer)	Approver
2. Hansen, Tom (Accounting Manager)	Document Owner
3. Benton, Carol (Manager)	Reviewer
4. Driggs, Shiela (Director of Finance)	Writer

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I
1	Title (Version)	Version	Ref. #	Status	First Name	Last Name	Job Title	Assignment Type	
2	Account Collector	1	294	Archived	Will	Gatos	Chief Informat	Approver	
3	Account Collector	1	294	Archived	Douglas	Johnson	Chief Executi	Document Owner	
4	Account Collector	1	293	Archived	Will	Gatos	Chief Informat	Approver	
5	Account Collector	1	293	Archived	Douglas	Johnson	Chief Executi	Document Owner	
6	Account Collector	2	293	Approved	Will	Gatos	Chief Informat	Approver	

Report: Document Count by Owner

Description

For each document owner, shows how many assigned documents and questionnaires are in each status.


Available to users with the following roles or permissions:

Document Owner, Proxy Author, Report Manager, Administrator

Sample Report:

Document Count by Owner

Delta Regional Medical
Center

powered by 

Pages: 2

Generated By: Susan Howard

Generated: 04/17/2013 1:18 PM

1. Corporate Headquarters

Document Owners (15)

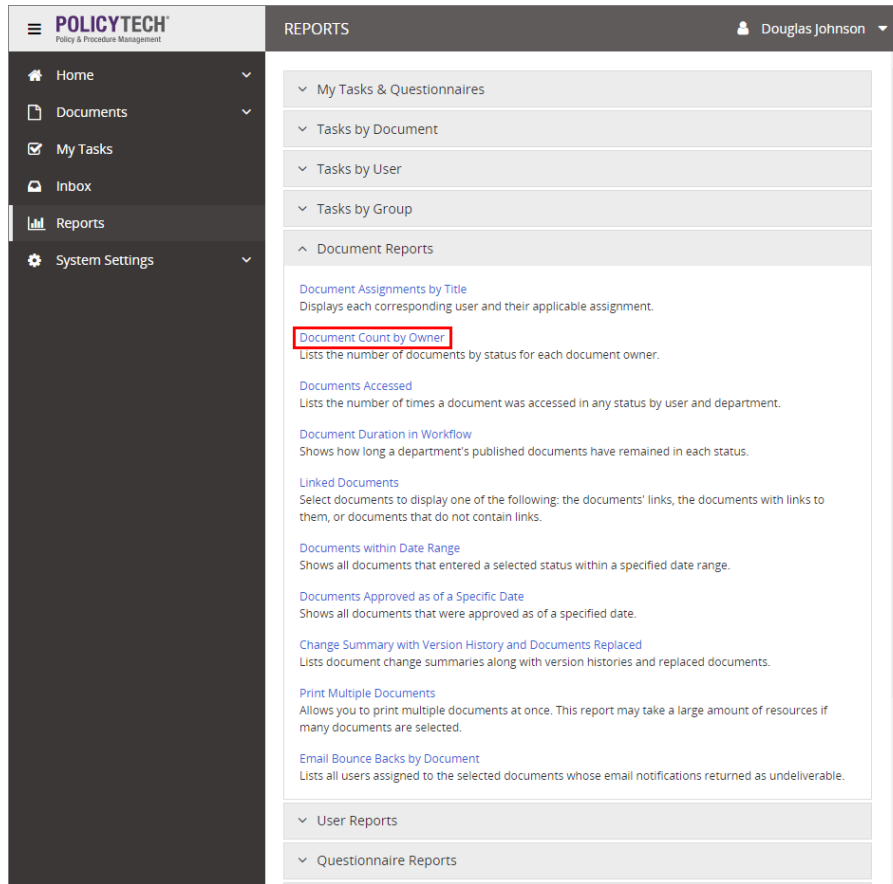
	<u>Document Owners</u>	<u>Draft</u>	<u>Collaboration</u>	<u>Review</u>	<u>Approval</u>	<u>Published</u>	<u>Totals</u>
1.	Benton, Carol (Environmental Services - Environmental Control Manager)	1	2	2	0	6	11
2.	Breen, Darren (Human Resources - Personnel Manager)	7	0	0	1	13	21
3.	Driggs, Sheila (Fiscal Services - Director of Finance)	7	4	11	0	3	25
4.	Farnsworth, John (Systems Administration - Information Systems Manager)	12	0	0	0	0	12
5.	Gatos, Will (Administration Dept - Chief Information Officer)	1	0	0	0	0	1
6.	Gleeson, Edward (Manufacturing - Manufacturing Manager)	8	0	3	1	3	15
7.	Hansen, Tom (Accounting - Accounting Manager)	3	2	4	3	12	24
8.	Howard, Susan (Administration - Document Control Administrator)	42	2	14	0	9	67
9.	Johnson, Douglas (Administration - Chief Executive Officer)	7	0	2	0	18	27
10.	Jones, Anne (Administration - Chief Finance Officer)	1	0	0	0	1	2
11.	Lavin, Alice (Disaster Recovery - Manager)	3	0	2	1	1	7
12.	Rydalch, Cindy (Shipping and Receiving - Receiving)	3	0	1	3	4	11
13.	Stoker, Brent (Engineering - Director of Engineering)	0	5	4	0	6	15
14.	Thomas, Brad (Operations - Director of Operations)	0	5	3	2	0	10
15.	Wright, Fred (Software Development - Software Development Manager)	4	0	0	0	14	18

1/2

1/2


How to Generate

1. Click **Reports**.
2. Click **Document Reports**, and then click **Document Count by Owner**.



3. In the **Output Format** area, click **Standard** or **Microsoft Excel Raw**.



4. (Optional) To save the **Output Format** setting for future use, click , type a name and description, click **Save and Close**, and then click **OK**.

Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

5. 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.

policytech

NAVEX Global

Document Count by Owner

Pages: 2 Generated By: Douglas Johnson Generated: 09/30/2016 14:50

1. Corporate Headquarters

Document Owners (12)

Document Owners	Draft	Collaboration	Review	Approval	Pending	Published	Totals
Accounting, DocOwner (Accounting - Owner)	0	0	0	0	0	1	1
Breen, Darren (Human Resources - HR Director)	2	0	0	0	0	1	3
Disaster Recovery, DocOwner (Disaster Recovery - Owner)	7	0	0	0	0	0	7
Educational Resources, DocOwner (Educational Resources - Owner)	5	0	0	0	0	0	5
Engineering, DocOwner (Engineering - Owner)	16	0	0	0	0	0	16
Fiscal Services, DocOwner (Fiscal Services - Owner)	15	0	0	0	0	0	15
Hansen, Tom (Accounting - Accounting Manager)	24	1	1	3	0	3	32
Human Resources, DocOwner (Human Resources - Owner)	18	0	0	0	0	1	19
Johnson, Douglas (Administration - Chief Executive Officer)	6	0	0	0	0	0	6

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Site	First Name	Last Name	Department	Job Title	Draft	Collaboration	Review	Approval	Published	Total	
2	Corporate Headquarters	Susan	Howard	Administration	Document, Control Administrator	20	0	4	4	6	34	
3	Corporate Headquarters	Jordan	Cash	Accounting	Accounts Payable Clerk	0	0	0	0	1	1	
4	Sales & Support Office	Scott	Owens	Sales & Marketing	Director of Sales & Marketing	11	0	0	0	0	11	
5	Sales & Support Office	Meekem	Jolley	Customer Service	Customer Service Manager	15	0	0	0	0	15	
6	Corporate Headquarters	Fred	Wright	Software Development	Software Development Manager	3	0	3	2	5	13	

Report: Documents Accessed

Description

Shows which documents or questionnaires were accessed by which users within a specific date range.

Available to users with the following roles or permissions:

Document Owner, Proxy Author, Report Manager, Administrator

Sample Report:

Documents Accessed

NAVEX Global
Last 30 Days (03/18/2013 - 04/17/2013)
powered by policytech

Pages: 6
Generated By: Susan Howard
04/17/2013 1:24 PM

Summary

	Number of Documents	System Users Access Count
Archived	13	1
Published	62	36
Pending	4	0
Approval	10	9
Review	12	0
Collaboration	9	0
Draft	184	5
Total	294	51

Documents Accessed Logs

[1. Account Collections Form \(v.1\)](#)
Ref. # 1
Approved

Access Log by Workflow Step (3)

Published (3)

1.	03/21/2013 3:42 PM	Hansen, Tom (Accounting - Accounting Manager)
2.	03/21/2013 4:09 PM	Hansen, Tom (Accounting - Accounting Manager)
3.	03/27/2013 4:45 PM	Howard, Susan (Administration - Document, Control Administrator)

[2. Accounts Payable and Cash Distribution \(v.1\)](#)
Ref. # 2
Draft

Access Log by Workflow Step (1)

Published (1)

4.	04/03/2013 1:09 PM	Hansen, Tom (Accounting - Accounting Manager)
----	--------------------	---

[3. Bad NSF Checks \(v.1\)](#)
Ref. # 3
In Approval

Access Log by Workflow Step (1)

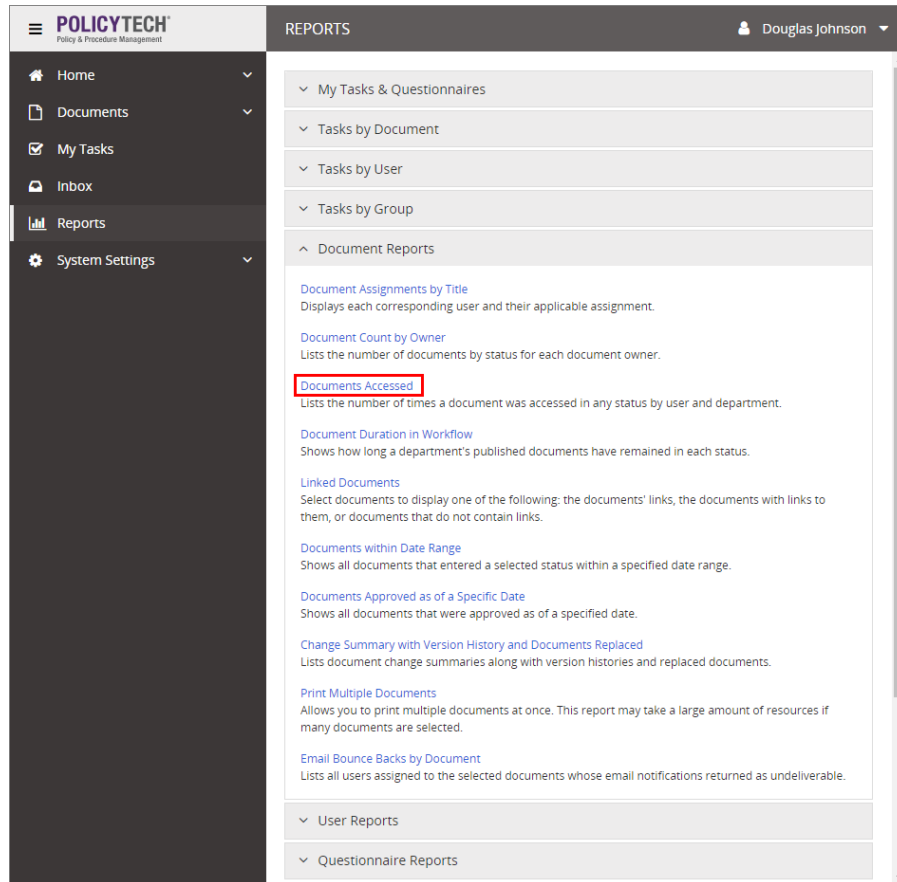
Published (1)

5.	04/03/2013 1:09 PM	Hansen, Tom (Accounting - Accounting Manager)
----	--------------------	---

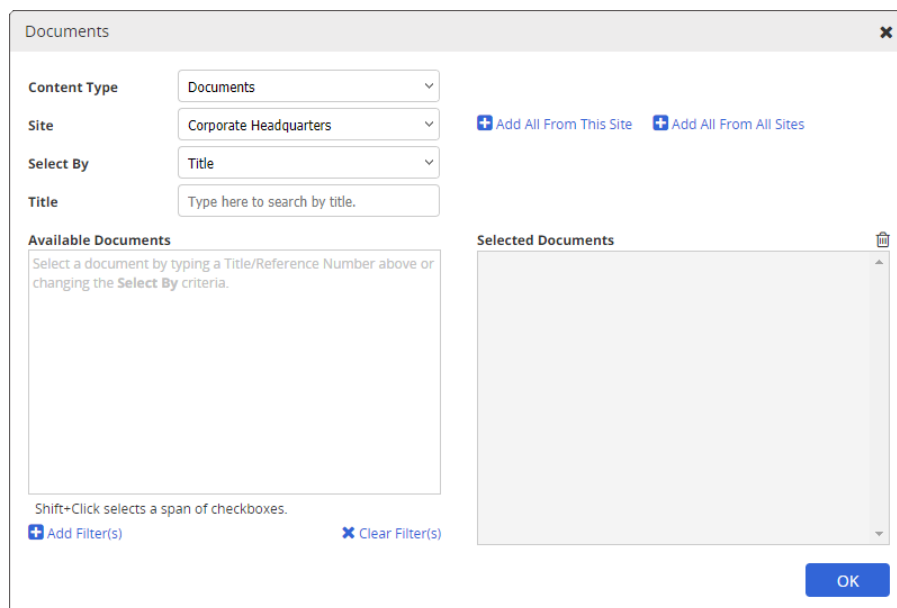
1/6

How to Generate

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

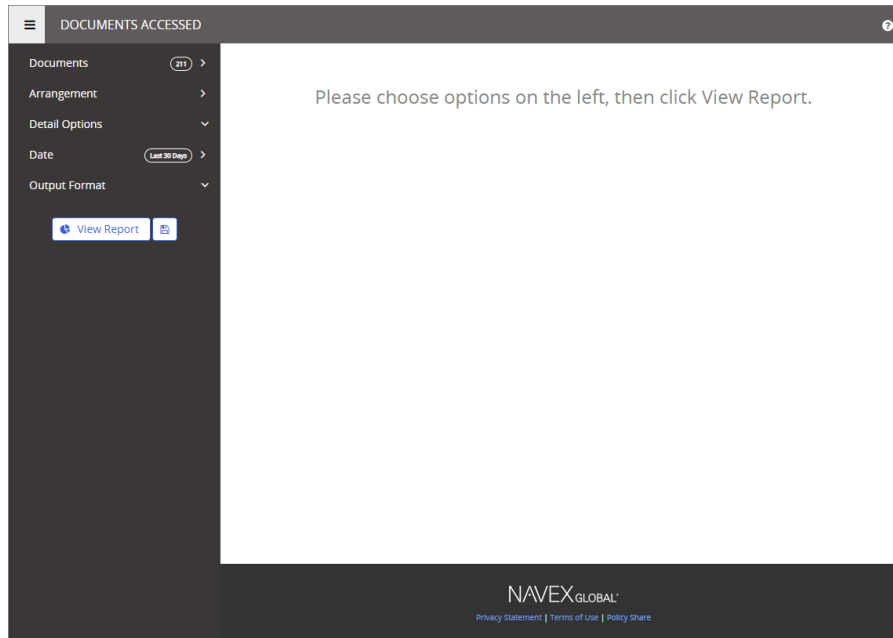


3. Select documents or questionnaires to include in the report (see [Selecting Documents](#) for help), and then click **OK**.



All options available for this report are displayed on the left. Notice that the number of currently selected documents/questionnaires is displayed after the **Documents** option, which you can click anytime to change your document/questionnaire selection.

Note: If you change your document/questionnaire selection after clicking **View Report**, click **View Report** again to refresh the report contents.



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 the **Ref #** check box.

Arrangement ✕

Documents Found: 211

[Show/Hide Columns](#)

- ☒ Ref #
- ☒ Title (Version)
- ☒ Status

Ref #	Title (Version)	
52	Account Collection Process (v.1)	
320	Account Collection Process (v.1)	Approved
320	Account Collection Process (v.2)	In Approval
1	Account Collections Form (v.1)	Approved
2	Accounts Payable and Cash Distribution (v.1)	Approved
67	Americans with Disabilities Act (v.1)	Approved
86	Assembly Manuals (v.1)	Draft
3	Bad NSF Checks (v.1)	Approved
4	Bank Account Reconciliation (v.1)	Approved
53	Bank Loan Applications (v.1)	Draft

Page 1 of 22 Records 1 - 10

OK

- 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. (Optional) Click **Detail Options**, and then select any of the following:

Documents 211 >

Arrangement >

Detail Options ^

☒ Include Document Details

☐ Include Graphs

Date Last 30 Days >

Output Format v

[View Report](#)

- **Include Document Details:** Includes a list of users who accessed each selected document/questionnaire.

Documents Accessed Logs

[1. Account Collections Form \(v.1\)](#)

Ref. # 1

Approved

Access Log by Workflow Step (3)

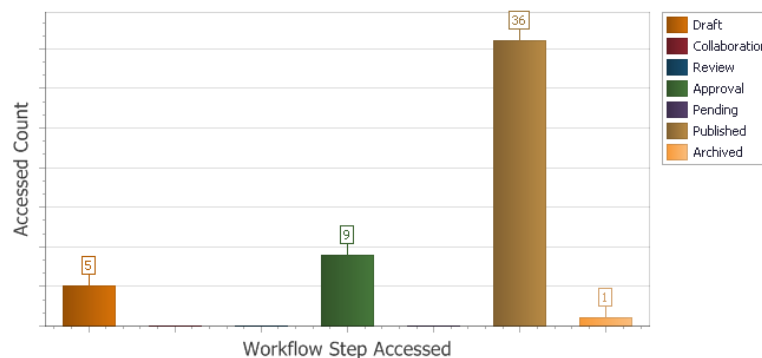
Published (3)

1.	03/21/2013 5:42 PM	Hansen, Tom (Accounting - Accounting Manager)
2.	03/21/2013 6:09 PM	Hansen, Tom (Accounting - Accounting Manager)
3.	03/27/2013 6:45 PM	Howard, Susan (Administration - Document, Control Administrator)

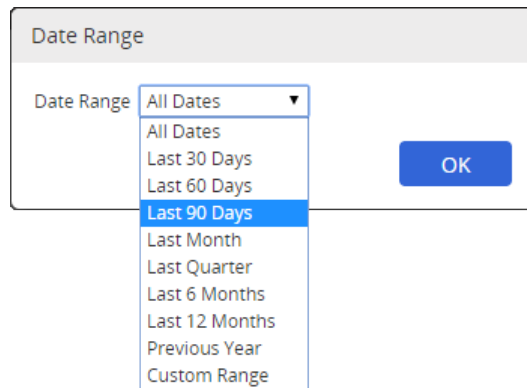
- **Include Graphs:** Adds a graph to the **Summary** area of the report. The graph shows the number of users who accessed the selected documents/questionnaires in each status.

Summary

	Number of Documents	System Users Access Count
Archived	13	1
Published	62	36
Pending	4	0
Approval	10	9
Review	12	0
Collaboration	9	0
Draft	184	5
Total	294	51

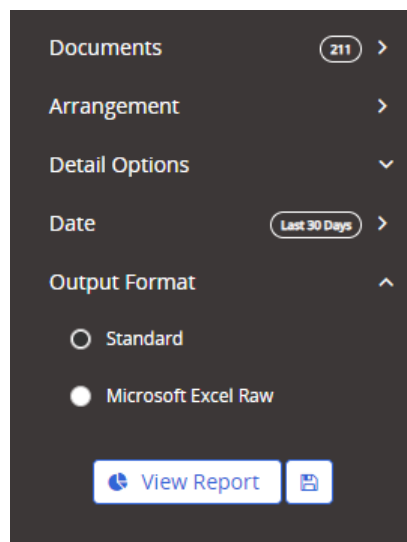


6. (Optional) By default, this report checks when the selected documents/questionnaires were accessed regardless of the access date. To limit results to a date range, click **Date**, and then select a range. If you click **Custom Range**, also type or select **From** and **To** dates. Click **OK**.




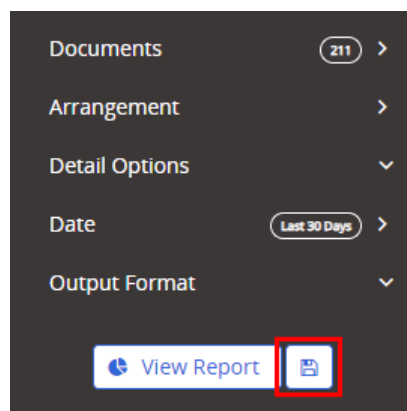
A dialog box titled "Date Range" with a dropdown menu and an "OK" button. The dropdown menu is open, showing the following options: All Dates, Last 30 Days, Last 60 Days, Last 90 Days (highlighted), Last Month, Last Quarter, Last 6 Months, Last 12 Months, Previous Year, and Custom Range.

7. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.



A settings panel with a dark background. It includes sections for "Documents" (211 items), "Arrangement", "Detail Options", "Date" (Last 30 Days), and "Output Format". Under "Output Format", there are two radio button options: "Standard" and "Microsoft Excel Raw" (which is selected). At the bottom are "View Report" and "Save" buttons.

8. (Optional) To save the current document/questionnaire selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.

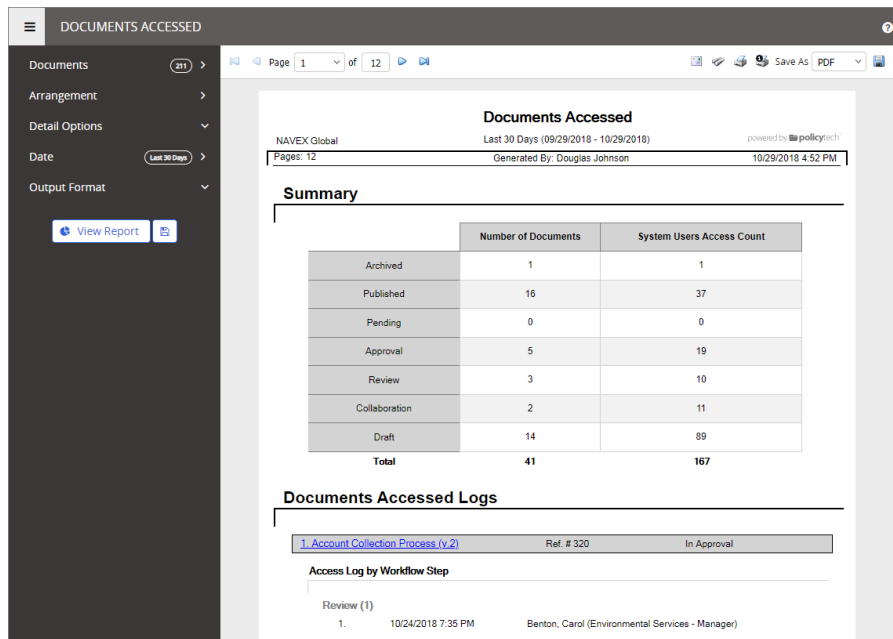


A settings panel identical to the one above, but with a red rectangle highlighting the "Save" button (represented by a floppy disk icon) at the bottom right.

Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

9. 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**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K
1	Ref. #	Title (Version)	Version	Date/Time	Workflow Step	First Name	Last Name	Job Title	Site	Department	
2	1	Account	1	10/30/2014 08:18	Published	Douglas	Johnson	Chief Executive	Corporate H	Administration	
3	1	Account	1	10/30/2014 08:21	Published	Douglas	Johnson	Chief Executive	Corporate H	Administration	
4	216	Account	2	10/29/2014 15:02	Approval	Susan	Howard	Document, Con	Corporate H	Administration	
5	204	Account	1								
6	296	Account	1								

Report: Document Duration in Workflow

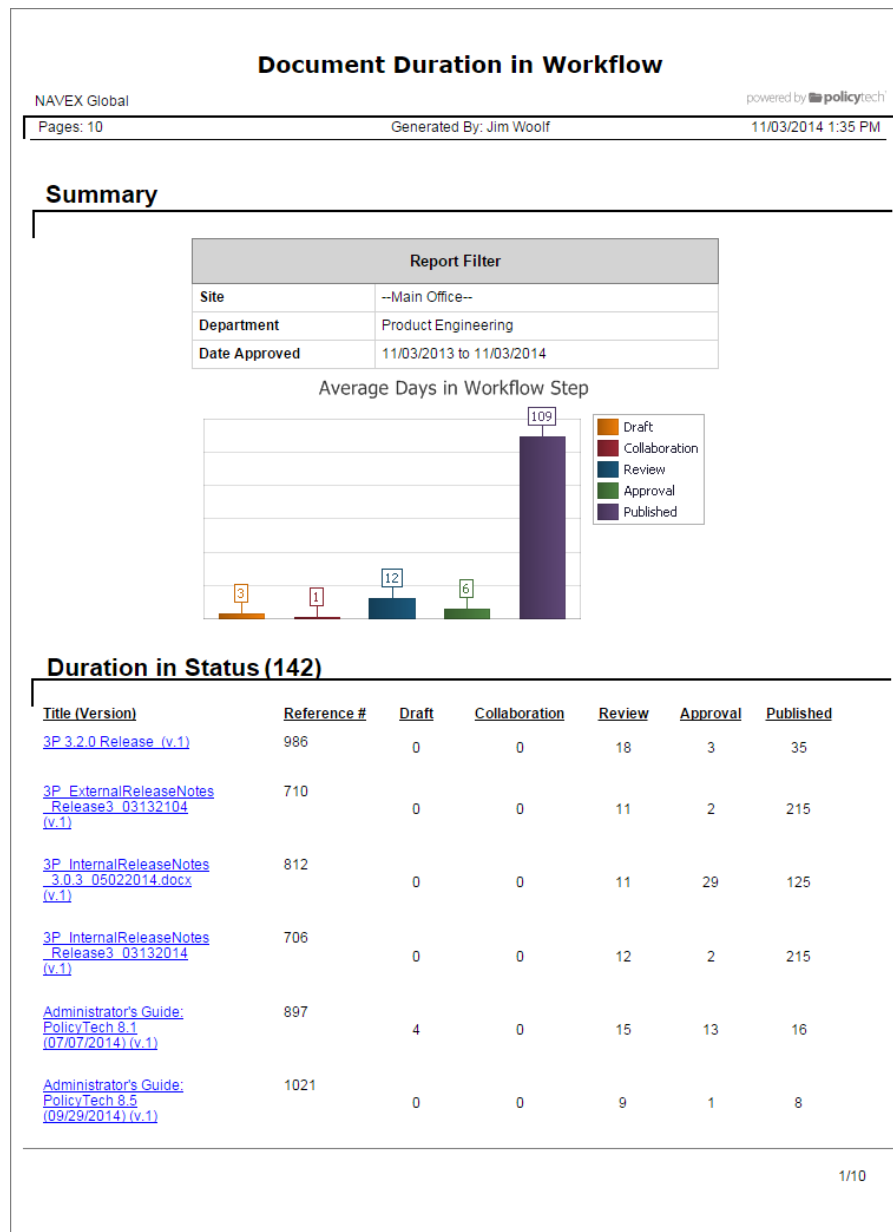
Description

Shows how long each selected document was in each of the workflow statuses. The summary graph shows averages for all published documents.

Available to users with the following roles or permissions:

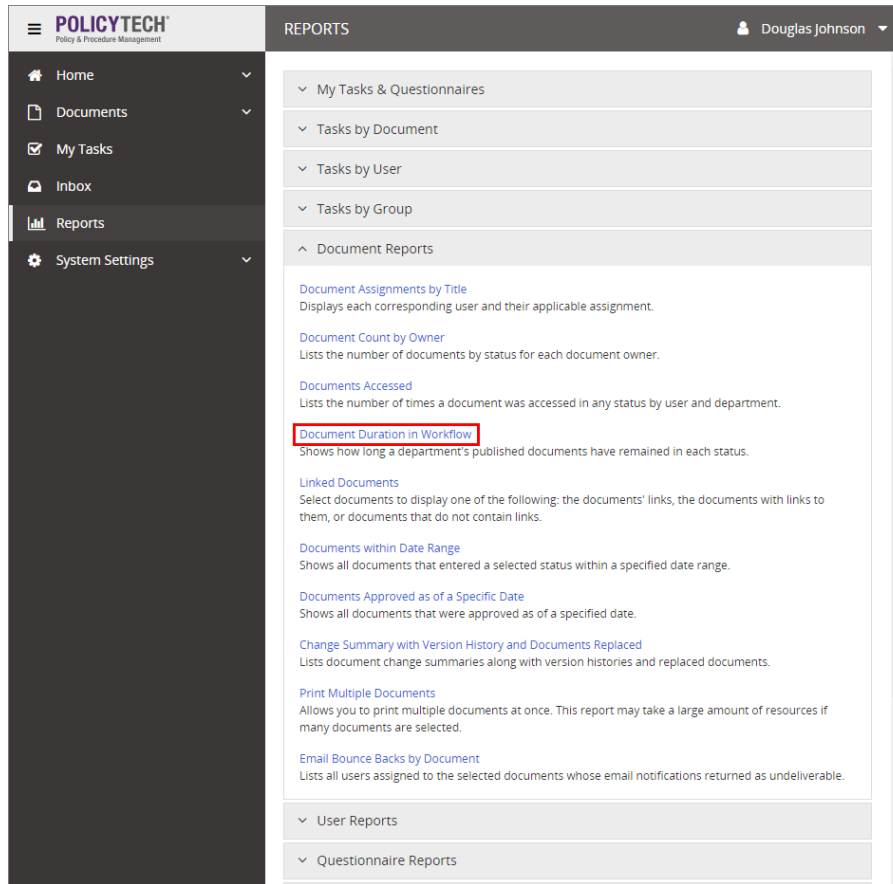
Document Owner, Proxy Author, Report Manager, Administrator

Sample Report:



How to Generate

1. Click **Reports**.
2. Click **Document Reports**, and then click **Document Duration in Workflow**.



- For **Content Type**, select whether to see information about documents or questionnaires.

Document Duration in Workflow

Shows how long a department's published documents have
More

OPTIONS

Content Type

Documents

Site

Corporate Headquarters

Department

-- Select a Department --

FILTER BY APPROVED DATE


Date Range

Last 30 Days

OUTPUT FORMAT

☒ Standard
☐ Microsoft Excel Raw

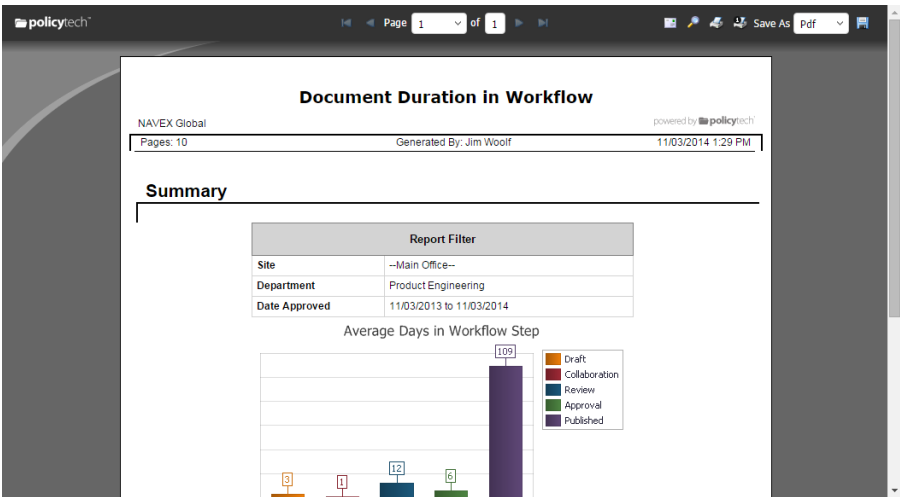
View Report
Save

4. Select a site and department.
5. Select a date range. If you click **Custom Range**, also type or select **From** and **To** dates.
6. In the **Output Format** area, click **Standard** or **Microsoft Excel Raw**.
7. (Optional) To save the current settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.

Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

8. Click **View Report**.

If you chose the **Standard** output format, the report opens in a new window where you can view, print, and save the document to disk in several different formats. If the report contains links, click a link to open that document or questionnaire in PolicyTech or click a user name to open another report specific to that user.



If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Site	Department	Document	Document Ow	Job Title	Ref. #	Title (Version)	Version	Draft	Collabor	Review	Approval	Published	
2	Corporate Hea	Accounting	Tom	Hansen	Accounting Manager	1	Account Collections Form (v.1)	1	934	0	0	0	0	
3	Corporate Hea	Accounting	Tom	Hansen	Accounting Manager	3	Bad NSF Checks (v.1)	1	934	0	0	0	0	
4	Corporate Hea	Accounting	Tom	Hansen	Accounting Manager	11	Fixed Asset Control (v.1)	1	936	0	1	0	0	
5														

Report: Linked Documents

Description

Shows the inserted links, if any, for each of the selected documents. You can also choose to show which documents are linking to the selected documents or only those selected documents that contain no links.

Available to users with the following roles or permissions:

Document Owner, Proxy Author, Report Manager, Administrator

Sample Report:

Linked Documents

NAVEX Global
powered by policytech

Pages: 2
Generated By: Susan Howard
Generated: 04/17/2013 3:28 PM

Summary

Draft	In Review	In Approval	Pending	Approved
0	0	0	0	3

Selected Documents

[1_Bad NSF Checks \(v.1\)](#)
3
Hansen, Tom (Accounting Manager)
Corporate Headquarters
Accounting

Assigned Categories (1)

- Policies (Document Type/)

Links in Document (1)

	Title	Reference #	Status	Document Owner	Inserted
1.	Accounts Payable and Cash Distribution (v.1)	2	Approved	Hansen, Tom	Yes

[2_Cash Receipts \(v.1\)](#)
322
Allison, Todd (Tester)
Corporate Headquarters
Quality Assurance

Assigned Categories (0)

Document is not assigned to any categories

Links in Document (3)

	Title	Reference #	Status	Document Owner	Inserted
1.	Bad NSF Checks (v.1)	3	Approved	Hansen, Tom	Yes
2.	Bank Account Reconciliation (v.1)	4	Draft	Hansen, Tom	Yes
3.	Cash Drawers (v.1)	6	Approved	Allison, Todd	Yes

[3_Check Requests \(v.1\)](#)
9
Hansen, Tom (Accounting Manager)
Corporate Headquarters
Accounting

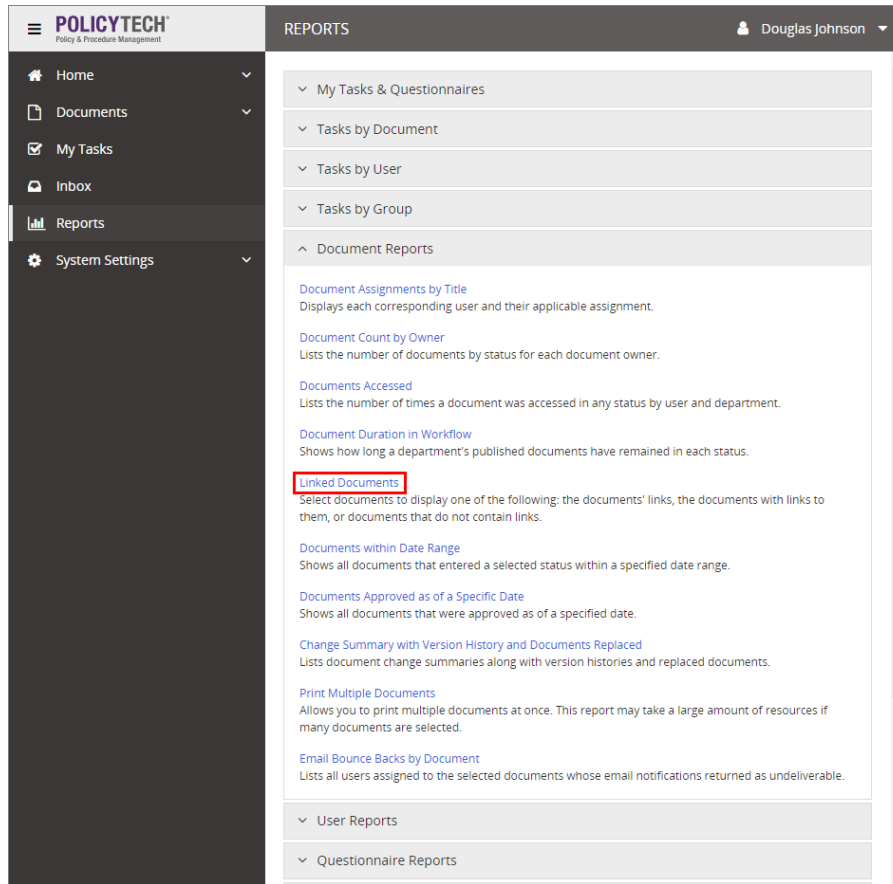
Assigned Categories (1)

- Policies (Document Type/)

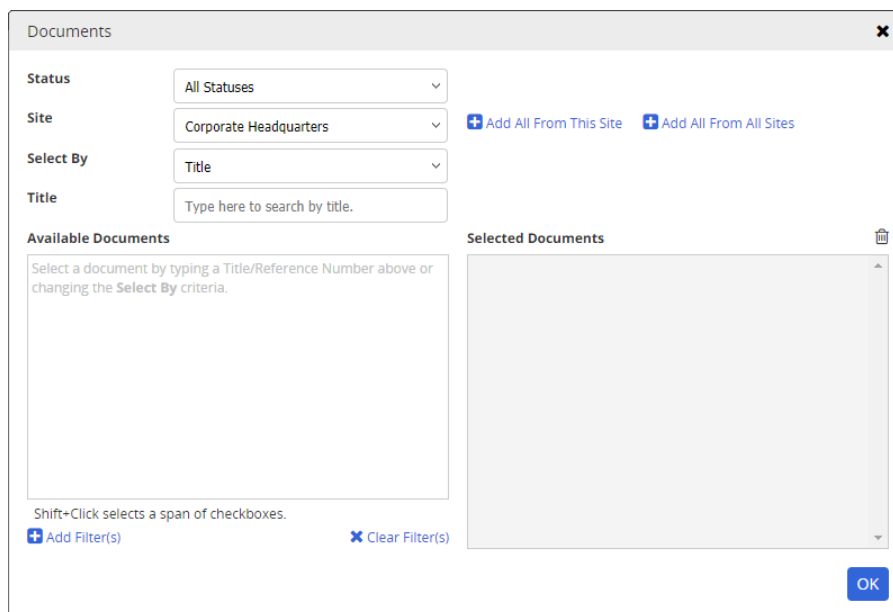
1/2

How to Generate

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

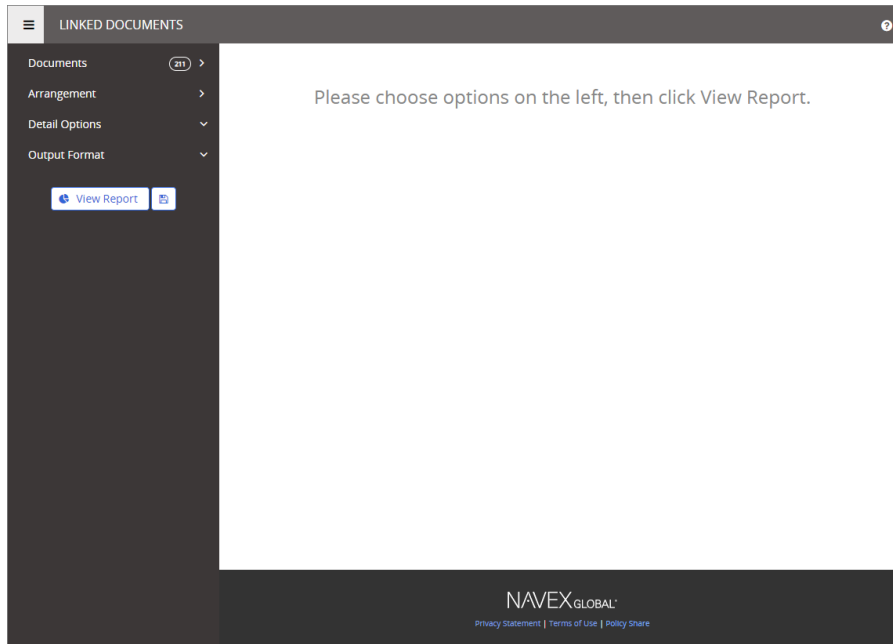


3. Select documents or questionnaires to include in the report (see [Selecting Documents](#) for help), and then click **OK**.



All options available for this report are displayed on the left. Notice that the number of currently selected documents/questionnaires is displayed after the **Documents** option, which you can click anytime to change your document/questionnaire selection.

Note: If you change your document/questionnaire selection after clicking **View Report**, click **View Report** again to refresh the report contents.



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.

Arrangement

Documents Found: 211

Ref #	Title (Version)	Document Owner		
52	Account Collection Process (v.1)	Hansen, Tom (Accounting Manager)		
320	Account Collection Process (v.1)	Hansen, Tom (Accounting Manager)		
320	Account Collection Process (v.2)	Hansen, Tom (Accounting Manager)	Corporate Headquarters	/
1	Account Collections Form (v.1)	Hansen, Tom (Accounting Manager)	Corporate Headquarters	/
2	Accounts Payable and Cash Distribution (v.1)	Driggs, Shiela (Director of Finance)	Corporate Headquarters	/
67	Americans with Disabilities Act (v.1)	Hansen, Tom (Accounting Manager)	Corporate Headquarters	/
86	Assembly Manuals (v.1)	Hansen, Tom (Accounting Manager)	Corporate Headquarters	/
3	Bad NSF Checks (v.1)	Hansen, Tom (Accounting Manager)	Corporate Headquarters	/
4	Bank Account Reconciliation (v.1)	Hansen, Tom (Accounting Manager)	Corporate Headquarters	/
53	Bank Loan Applications (v.1)	Hansen, Tom (Accounting Manager)	Corporate Headquarters	/

Page 1 of 22 Records 1 - 10

OK

- 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. (Optional) Click **Detail Options**, and then select any of the following:

Documents 211 >

Arrangement >



Detail Options ^

☐ Show links contained in selected documents

☒ Show links to selected documents

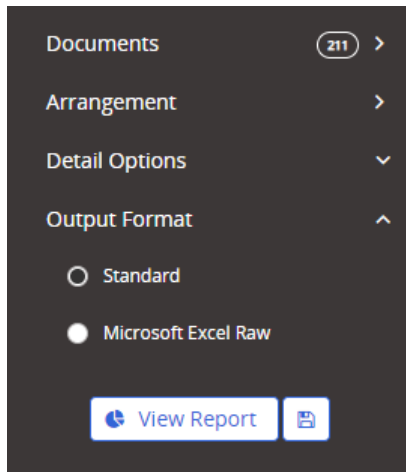
☐ Show documents containing no links


Output Format v

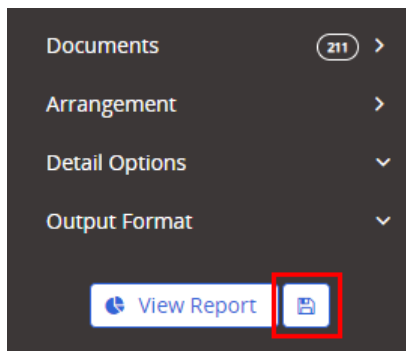
 View Report 

- **Show links contained in selected documents**
- **Show links to selected documents**

- **Show documents containing no links**
 - **Show localization workflow documents** (Available only when the Localization Workflow module has been enabled. See "Running Localization Workflow Reports" in the [Localization Workflow Supplement](#).)
6. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.



7. (Optional) To save the current document/questionnaire selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

8. 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.

LINKED DOCUMENTS

NAVEX Global powered by pollytech

Pages: 54 Generated By: Douglas Johnson Generated: 10/29/2018 5:21 PM

Summary

Draft	In Review	In Approval	Pending	Approved
162	4	11	0	32

Selected Documents

1. Account Collection Process (v.1) Ref. # 52 Hansen, Tom (Accounting Manager) Corporate Headquarters Accounting

Assigned Categories (1)

1. Subcategory (Policies)

Links in Document (1)

Title	Reference #	Status	Document Owner	Inserted
1. Account Collections Form (v.1)	1	Approved	Hansen, Tom	Yes

2. Account Collection Process (v.1) Ref. # 320 Hansen, Tom (Accounting Manager) Corporate Headquarters Accounting

Assigned Categories (1)

1. Procedure (Document Type)

Links in Document (1)

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

Ref. #	Title (Version)	Assigned Categories	Document	Document	Job Title	Site	Department	Status	Link Document Title	Link Document Status	Inserted
1	1 Account Collections Forms (Document Ty		Tom	Hansen	Accountant	Corpo	Fiscal Service	Approved	Account Collection Proc	Archived	Yes
3	267 Cash Drawers (v.1)		Susan	Howard	Document	Corpo	Administratio	In Approval	Bank Account Reconcili	Draft	Yes
4	257 Certified Auditor Lis		Tom	Hansen	Accountant	Corpo	Technical Se	Approved	Special Characters (v.1)	Approved	Yes
5	270 Fixed Asset Control		Susan	Howard	Document	Corpo	Administratio	Approved	Archive Doc (v.1)	Approved	Yes
6	287 Travel Expense Poli		Susan	Howard	Document	Corpo	Administratio	Approved	Preferred Hotels (v.1)	Archived	Yes

Report: Documents within Date Range

Description

Shows which documents were created (first saved in draft status) within the selected date range.

Available to users with the following roles or permissions:

Document Owner, Proxy Author, Report Manager, Administrator

Sample Report:

Documents within Date Range

NAVEX Global
Date Created from 03/18/2013 to 04/17/2013
powered by policytech

Pages: 1
Generated By: Susan Howard
04/17/2013 3:44 PM

Summary

Number of Documents

3

Filter Criteria

[Filter Criteria](#)
Status: Draft
Site: Corporate Headquarters
All Documents in Site: Corporate Headquarters

Documents in Selected Date Range

1. Benton, Carol (Environmental Control Manager)

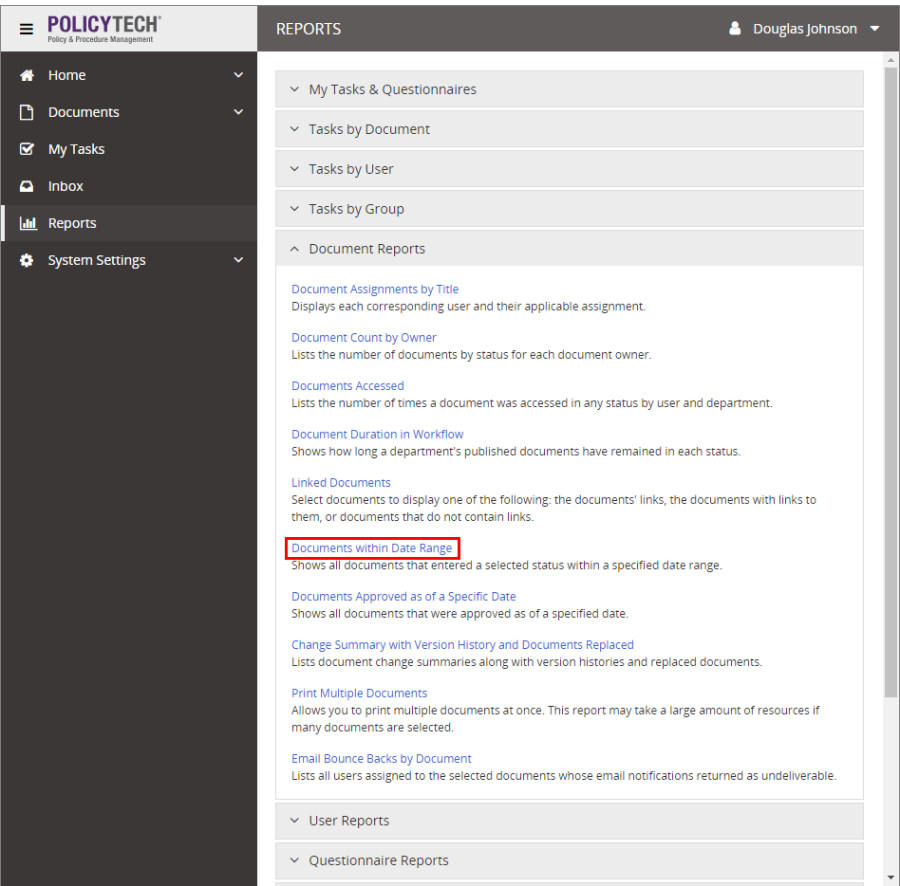
Documents by Owners (3)

	Ref. #	Title (Version)	Status	Date Created	Date Submitted	Date Approved	Publication Date
1.	322	Cash Receipts (v.2)	Draft	03/21/2013	04/02/2013	Not Approved Yet	Not Approved Yet
2.	329	Family and Medical Leave Policy (v.1)	Draft	04/10/2013	Not Submitted Yet	Not Approved Yet	Not Approved Yet
3.	330	Year End Closing (v.1)	Draft	04/10/2013	Not Submitted Yet	Not Approved Yet	Not Approved Yet

1/1

How to Generate

1. Click **Reports**.
2. Click **Document Reports**, and then click **Documents within Date Range**.



3. For **Content Type**, select whether to see information about documents or questionnaires.

Documents within Date Range ✕

Shows all documents that entered a selected status within a specified date range.

Options

Content Type Documents

Status Draft - Draft

Site Corporate Headquarters

Select By All Documents in Site

All Documents in Site Corporate Headquarters

Filter By


Date Created

Date Range Last 30 Days

Output Format

☒ Standard

☐ Microsoft Excel Raw

[View Report](#) 

4. Select the status of the documents/questionnaires you want included in the report.
5. If your PolicyTech system has multiple sites, select a site.
6. For **Select By**, click an option for how you want to select documents/questionnaires within the selected status and site.

Options

Status Draft - Draft

Site Corporate Headquarters

Select By All Documents in Site

All Documents in Site

- Department
- Department Group
- Document Owner
- Writer
- Writer Group
- Reviewer
- Reviewer Group

7. The list below **Select By** changes, depending on the **Select By** option you choose. Do one of the following:

- If the **Select By** setting is currently **All Documents in Site**, no further options are available and you can move on to the next step.
- If the **Select By** setting is any other option, in the list below **Select By**, click an item. For example, if you click **Department** for **Select By**, then, in the **Department** list, click a department.

Options


Status Draft - Draft

Site Corporate Headquarters

Select By Department

Department Choose -

- [All Departments]
- Accounting
- Administration
- Disaster Recovery
- Educational Resources
- Engineering
- Environmental Services
- Fiscal Services
- Human Resources

7. In the **Filter By** area, in the **Date Range** list, click a range. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **Apply**.
8. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.
9. (Optional) To save the current settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.

Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

10. Click **View Report**.

If you chose the **Standard** output format, the report opens in a new window where you can view, print, and save the document to disk in several different formats. If the report contains links, click a document/questionnaire link to open that document/questionnaire in PolicyTech or click a user name to open another report specific to that user.

policytech

Page 1 of 1

NAVEX Global Date Created from 08/31/2016 to 09/30/2016 powered by policytech

Pages: 1 Generated By: Douglas Johnson 09/30/2016 15:32

Documents within Date Range

Summary

Number of Documents
6

Filter Criteria
Filter Criteria Status: Draft Site: Corporate Headquarters Department: Accounting

Documents in Selected Date Range

Ref.	Title (Version)	Status	Date Created	Date Submitted	Date Approved	Publication Date
1. Breen, Darren (HR Director)	Corporate Headquarters	Human Resources				

Documents by Owners (1)

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Site	Department	Document	Own	Ref. #	Title (Versi	Version Nu	Status	Date Creat	Date Subn	Publication	Date
2	Corporate	Accounting	Tom Hansen	123	Account C	2	Approved	4/2/13	4/9/13	4/27/13		
3	Corporate	Accounting	Tom Hansen	66	Bank Acco	1	Approved	1/22/13	1/25/13	1/25/13		
4	Corporate	Accounting	Tom Hansen	19	Cash Draw	3	Approved	2/17/13	2/18/13	2/21/13		
5	Corporate	Accounting	Tom Hansen	45	Fixed Assi	2	Approved	4/5/13	4/23/13	4/26/13		

Report: Documents Approved as of a Specific Date

Description

Shows all documents or questionnaires that were approved before or on the specified date.

Available to users with the following roles or permissions:

Document Owner, Proxy Author, Report Manager, Administrator

Sample Report:

Documents published as of 04/17/2013

NAVEX Global
powered by policytech

Pages: 2
Generated By: Susan Howard
04/17/2013 4:09 PM

Summary

Number of Documents
40

Filter Criteria
Filter Criteria
Status: Published
Site: Corporate Headquarters
All Documents in Site: Corporate Headquarters

Documents in Selected Date Range

1. Benton, Carol (Environmental Control Manager)

Documents by Owners (40)

Ref. #	Title (Version)	Date Approved	Publication Date
1. 6	Cash Drawers (v.1)	03/18/2013	03/18/2013
2. 322	Cash Receipts (v.1)	03/19/2013	03/19/2013
3. 1	Account Collections Form (v.1)	11/04/2010	11/04/2010
4. 2	Accounts Payable and Cash Distribution (v.1)	03/02/2011	03/02/2011
5. 3	Bad NSF Checks (v.1)	03/04/2011	03/04/2011
6. 5	Capitilization (v.1)	03/18/2013	03/18/2013
7. 8	Chart of Accounts (v.1)	03/18/2013	03/18/2013
8. 9	Check Requests (v.1)	03/18/2013	03/18/2013
9. 10	Check Signing Authority (v.1)	03/18/2013	03/18/2013
10. 296	Family and Medical Leave Policy (v.1)	03/14/2013	03/14/2013
11. 287	Paid Time Off (PTO) Policy (v.1)	03/11/2013	03/11/2013
12. 17	Performance Evaluation - AP Clerk (v.1)	03/20/2013	04/29/2013
13. 281	Family and Medical Leave (v.1)	03/08/2013	03/08/2013
14. 319	Board of Directors (v.1)	03/18/2013	03/30/2013

1/2

How to Generate

1. Click **Reports**.
2. Click **Document Reports**, and then click **Documents Approved as of a Specific Date**.

POLICYTECH
Policy & Procedure Management

REPORTS Douglas Johnson

- My Tasks & Questionnaires
- Tasks by Document
- Tasks by User
- Tasks by Group
- Document Reports
 - [Document Assignments by Title](#)
Displays each corresponding user and their applicable assignment.
 - [Document Count by Owner](#)
Lists the number of documents by status for each document owner.
 - [Documents Accessed](#)
Lists the number of times a document was accessed in any status by user and department.
 - [Document Duration in Workflow](#)
Shows how long a department's published documents have remained in each status.
 - [Linked Documents](#)
Select documents to display one of the following: the documents' links, the documents with links to them, or documents that do not contain links.
 - [Documents within Date Range](#)
Shows all documents that entered a selected status within a specified date range.
 - [Documents Approved as of a Specific Date](#)**
Shows all documents that were approved as of a specified date.
 - [Change Summary with Version History and Documents Replaced](#)
Lists document change summaries along with version histories and replaced documents.
 - [Print Multiple Documents](#)
Allows you to print multiple documents at once. This report may take a large amount of resources if many documents are selected.
 - [Email Bounce Backs by Document](#)
Lists all users assigned to the selected documents whose email notifications returned as undeliverable.
- User Reports
- Questionnaire Reports

3. For **Content Type**, select whether to see information about documents or questionnaires.

Documents Approved as of a Specific Date

Shows all documents that were approved as of a specified date.

Options

Content Type Documents

Site Corporate Headquarters

Select By All Documents in Site

All Documents in Site Corporate Headquarters

Approved as of 05/16/2018

Output Format

☒ Standard

☐ Microsoft Excel Raw

View Report

4. If your PolicyTech system has multiple sites, select a site.
5. In the **Select By** list, click an option for how you want to select documents/questionnaires within the selected site.

The screenshot shows the 'Options' panel with the following settings:

- Site:** Corporate Headquarters
- Select By:** All Documents in Site (dropdown menu is open)
- All Documents:** (label visible)
- Approved as:** (label visible)

The 'Select By' dropdown menu is open, showing the following options:

- All Documents in Site (highlighted)
- Department
- Department Group
- Document Owner
- Writer
- Writer Group
- Reviewer
- Reviewer Group



6. The list below **Select By** changes, depending on the **Select By** option you choose. Do one of the following:
 - If the **Select By** setting is currently **All Documents in Site**, no further options are available and you can move on to the next step.
 - If the **Select By** setting is any other option, in the list below **Select By**, click an item. For example, if you click **Department** for **Select By**, then, in the **Department** list, click a department.

The screenshot shows the 'Options' panel with the following settings:

- Site:** Corporate Headquarters
- Select By:** Department
- Department:** -- Choose -- (dropdown menu is open)
- Approved as:** (label visible)

The 'Department' dropdown menu is open, showing the following options:

- [All Departments] (selected with a red dot)
- Accounting
- Administration
- Disaster Recovery
- Educational Resources
- Engineering

6. Next to the **Approved as of** box, click , and then click a date.
7. In the **Output Format** area, click **Standard** or **Microsoft Excel Raw**.
8. (Optional) To save the current settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.

Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

9. Click **View Report**.

If you chose the **Standard** output format, the report opens in a new window where you can view, print, and save the document to disk in several different formats. If the report contains links, click a document/questionnaire link to open that document/questionnaire in PolicyTech or click a user name to open another report specific to that user.

NAVEX Global powered by policytech

Pages: 1 Generated By: Douglas Johnson 09/30/2016 15:43

Summary

Number of Documents
5

Filter Criteria
Filter Criteria
Status: Published
Site: Corporate Headquarters
Department: Accounting

Documents in Selected Date Range

1. Accounting, DocOwner (Owner)	Corporate Headquarters	Accounting
---------------------------------	------------------------	------------

Documents by Owners (1)

Ref. #	Title (Version)	Date Approved	Publication Date
--------	-----------------	---------------	------------------

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

Screenshot...

	A	B	C	D	E	F	G	H	I	J	K
1	Site	Department	Docume	Document O	Job Title	Ref. #	Title (Version)	Version	Date Approved	Publication Date	
2	Corpo	Environment	Carol	Benton	Environme	314	Vacation Policy (	2	09/25/2014	09/25/2014	
3	Corpo	Human Resc	Darren	Breen	Personnel	207	Cash Receipts (v	1	06/30/2014	06/30/2014	
4	Corpo	Human Resc	Darren	Breen	Personnel	315	Vacation Policy (	2	09/25/2014	09/25/2014	
5	Corpo	Fiscal Servic	Shiela	Driggs	Director of	205	Year End Closing	1	06/30/2014	06/30/2014	
6	Corpo	Accounting	Tom	Hansen	Accountin	2	Accounts Payab	1	03/02/2011	03/02/2011	

Report: Change Summary with Version History and Documents Replaced

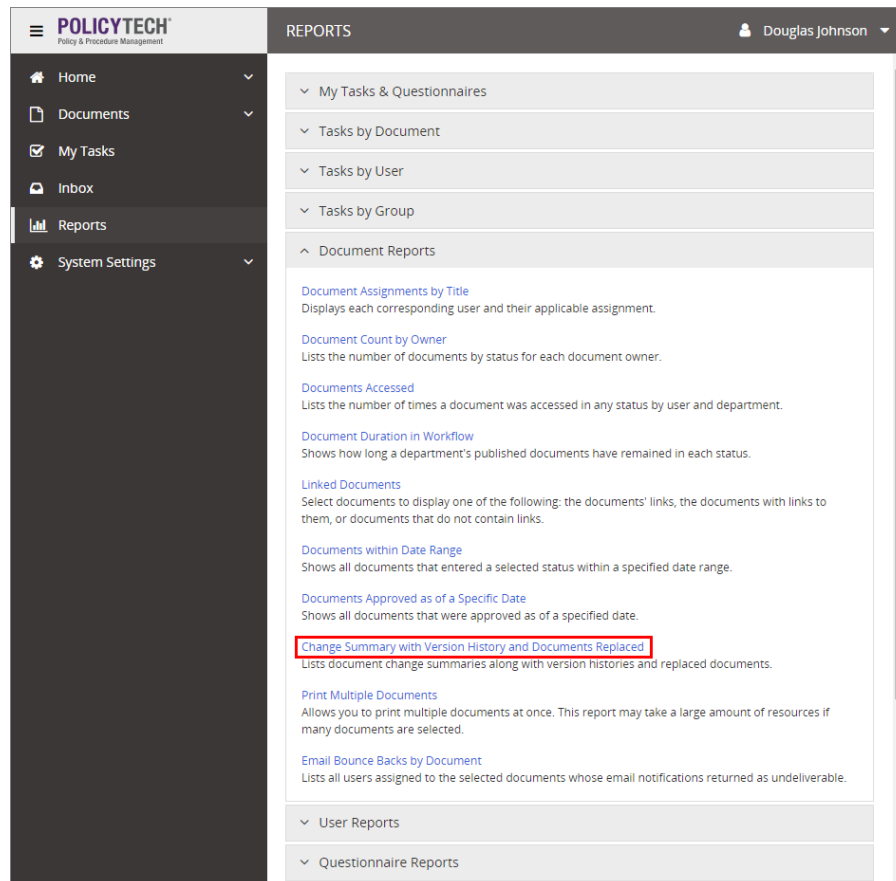
Description

When submitting a new document or questionnaire, or a new version of an existing document/questionnaire, to review or approval, a document owner must include the reason for creating the new document/questionnaire or a summary of changes to the existing document/questionnaire. This report shows the change summaries written by document owners upon submitting those documents/questionnaires (new or new version) for review or approval.

Note: By default, the text "New Document" or "New Version" is added to the text box when a document owner submits a document/questionnaire for review or approval. PolicyTech does not require the document owner to

How to Generate

1. Click **Reports**.
2. Click **Document Reports**, and then click **Change Summary with Version History and Documents Replaced**.



3. Select documents or questionnaires to include in the report (see [Selecting Documents](#) for help), and then click **OK**.

Documents

Content Type: Documents

Status: All Statuses

Site: Corporate Headquarters

Select By: Title

Title: Type here to search by title.

Available Documents: Select a document by typing a Title/Reference Number above or changing the Select By criteria.

Selected Documents

Shift+Click selects a span of checkboxes.

+ Add Filter(s) ✕ Clear Filter(s)

+ Add All From This Site + Add All From All Sites

OK

All options available for this report are displayed on the left. Notice that the number of currently selected documents/questionnaires is displayed after the **Documents** option, which you can click anytime to change your document/questionnaire selection.

Note: If you change your document/questionnaire selection after clicking **View Report**, click **View Report** again to refresh the report contents.

CHANGE SUMMARY WITH VERSION HISTORY AND DOCUMENTS REPLACED

Documents 211

Arrangement

Detail Options

Date All Dates

Output Format

View Report

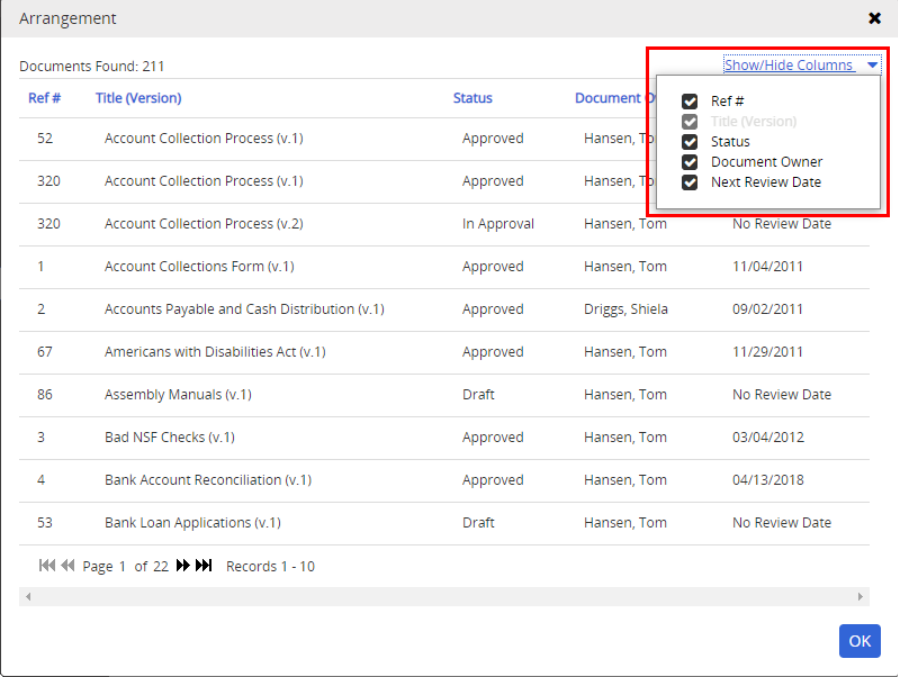
Please choose options on the left, then click View Report.

NAVEXGLOBAL

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4. (Optional) Click **Arrangement** and do any of the following:

- To change the default report columns, click **Show/Hide Columns**, and then select or click to clear check boxes.



Arrangement

Documents Found: 211

Ref #	Title (Version)	Status	Document Owner	Next Review Date
52	Account Collection Process (v.1)	Approved	Hansen, Tom	
320	Account Collection Process (v.1)	Approved	Hansen, Tom	
320	Account Collection Process (v.2)	In Approval	Hansen, Tom	No Review Date
1	Account Collections Form (v.1)	Approved	Hansen, Tom	11/04/2011
2	Accounts Payable and Cash Distribution (v.1)	Approved	Driggs, Shiela	09/02/2011
67	Americans with Disabilities Act (v.1)	Approved	Hansen, Tom	11/29/2011
86	Assembly Manuals (v.1)	Draft	Hansen, Tom	No Review Date
3	Bad NSF Checks (v.1)	Approved	Hansen, Tom	03/04/2012
4	Bank Account Reconciliation (v.1)	Approved	Hansen, Tom	04/13/2018
53	Bank Loan Applications (v.1)	Draft	Hansen, Tom	No Review Date

Page 1 of 22 Records 1 - 10

OK

- By default, the user sort order in the report is ascending by last name. To change what the users 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 select the information you want included in the report. See [Detail Options](#) below for details.

Documents (211) >

Arrangement >

Detail Options ^

- ☐ Include previous versions
- ☐ Include next versions
- ☐ Include 'Edit in Current State' summaries
- ☒ Include Owner/Approver Details
- ☒ Include Replaced Documents Details
- ☐ Include Assigned Categories

Date (All Dates) >

Output Format v

View Report

6. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.

Documents (211) >

Arrangement >

Detail Options v

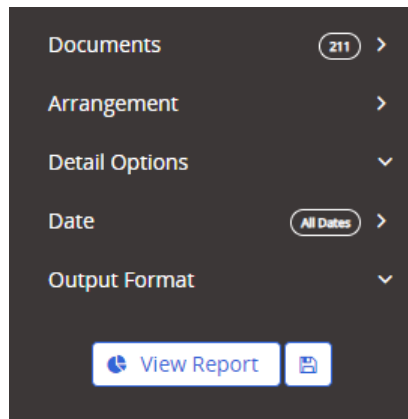
Date (All Dates) >

Output Format ^

- ☐ Standard
- ☒ Microsoft Excel Raw

View Report

7. (Optional) To save the current document/questionnaire selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

8. 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.

CHANGE SUMMARY WITH VERSION HISTORY AND DOCUMENTS REPLACED

NAVEX Global | Generated By: Johnson, Douglas | Generated: 10/29/2018 6:03 PM

Summary

Selected Documents	Unique Replaced Documents
211	0

Change Summary

Ref #: 52 | Account Collection Process (v. 1) | Approved | Owner: Hansen, Tom | Next Review Date: 08/30/2017

Change Summary

1.0 New Document

Owners/Approvers

Version	Owners/Approvers	Date Approved	Publication Date
1	Hansen, Tom (Accounting Manager) | Johnson, Douglas (Chief Executive Officer)	Owner | Approver	04/13/2017 | 04/13/2017

Version History with Documents Replaced

Version	Ref. #	Title (Version)	Publication Date	Replaced Documents
1	52	Account Collection Process	04/13/2017	None

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K
1	Ref. #	Version N	Title	Status	Document O	Approver	Date Approved	Publication	Change	Summary	
2	5	2.0	Capitalization	approved	Hansen, Tom	Johnson, Doi	11/23/2011 5:11	11/23/2011	New	Version	
3	8	1.0	Chart of Acco	approved	Hansen, Tom	Johnson, Doi	11/23/2011 4:3	11/23/2011	4:39:44	PM	
4	9	1.0	Check Reque	approved	Hansen, Tom	Johnson, Doi	11/23/2011 4:3	11/23/2011	4:39:35	PM	
5	10	1.0	Check Signin	approved	Hansen, Tom	Johnson, Doi	11/23/2011 4:3	11/23/2011	4:37:51	PM	

Detail Options

Include previous versions. Includes the change summaries for any previous versions of the selected document/questionnaire.

Include next versions. If a selected document/questionnaire is not the latest version, this option adds the change summaries for each later version.

With non-approved versions. Displayed only when **Include next versions** is selected. Select this option if you want to include the change summaries of versions currently in the review or approval status.

Note: Selecting **Include next versions** without selecting **With non-approved versions** applies only if you select documents/questionnaires in the archived status that were replaced by a newer version.

Include 'Edit in Current State' summaries. A document owner or administrator can make minor changes to an approved document without creating a new version and sending it through the approval process. When a user does this, PolicyTech requires the user to summarize changes and creates a minor version, appending a period and a minor version number to the major version number, such as 1.1 or 1.2. Selecting **Include 'Edit in Current State' summaries** adds minor version change summaries to the report.

Note: This option does not apply to questionnaires.

With system changes. Displayed only when **Include 'Edit in Current State' summaries** is selected. PolicyTech creates minor versions of a document each time it automatically updates something in the document, such as an inserted document property or a link to another PolicyTech document. Select this option if you want to include change summaries for system-generated minor versions.

Note: This option does not apply to questionnaires.

Include Owner/Approver Details. Adds the names and job titles (if included in the users' profiles) of the document owner and approver of each document version.

Include Replaced Document Details. Adds a list of documents, if any, each version replaced when it was published.

Note: This option does not apply to questionnaires.

Include Assigned Categories. For each included document/questionnaire, adds a list of its assigned categories.

Report: Print Multiple Documents

Description

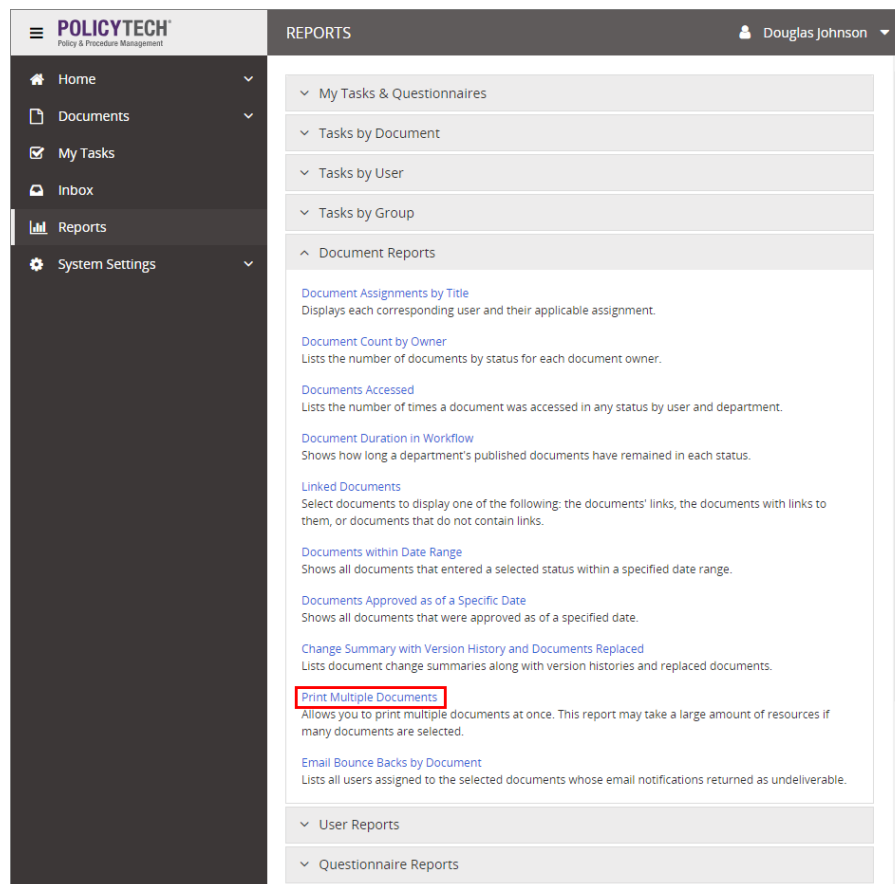
Lets you select and print multiple Microsoft Word and Excel documents at once.

Available to users with the following roles or permissions:

Document Owner, Proxy Author, Report Manager, Administrator


How to Generate

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



3. Select documents to include in the report (see [Selecting Documents](#) for help), and then click **OK**.

Important: By default, only documents assigned the **All Users** (default) security level are displayed in the **Available Documents** box. To display and have the option to select documents assigned the **Restricted - High** or **Restricted - Severe** security level, click **Show Restricted Documents**.

Restricted document titles are preceded by the  icon and are displayed in red font.

Print Multiple Documents

Use the selection tools below to build a list of documents you would like to see in this report.

Status: Approved - Published ☐ Show Restricted Documents

Site: Corporate Headquarters [Add All From This Site](#) [Add All From All Sites](#)

Select By: Title

Title:

Available Documents

Select a document by typing a Title/Reference Number above or changing the Select By criteria.

Selected Documents

Shift+Click selects a span of checkboxes.

[Add Filter\(s\)](#) [Clear Filter\(s\)](#)

[Cancel](#) [Print Documents](#) [Next](#)

4. Do one of the following:

- To start the automated printing of the selected documents, click **Print Documents**.
- To change one or more report settings, click **Next**, and then continue with the next step.

Print Multiple Documents

Use the options below to determine the detailed content of this report. Use the Document Arrangement section to select the document [More](#)

☒ Print Documents ([Paging Options](#)) ☐ Print Display Table

☐ Properties ([More](#)) ☒ Standard

☒ Document ☐ Microsoft Excel Raw

☐ Attachments (Microsoft Word & Excel only)

DOCUMENT ARRANGEMENT

Documents Found: 6 [Show/Hide Columns](#)

Title ^	Ver #	Status
Account Collections Form	1	Approved
Americans with Disabilities Act	1	Approved
Bad NSF Checks	1	Approved
Board of Directors	1	Approved
Safety Guidelines	2	Approved

Page 1 of 2 [Records 1 - 5](#)

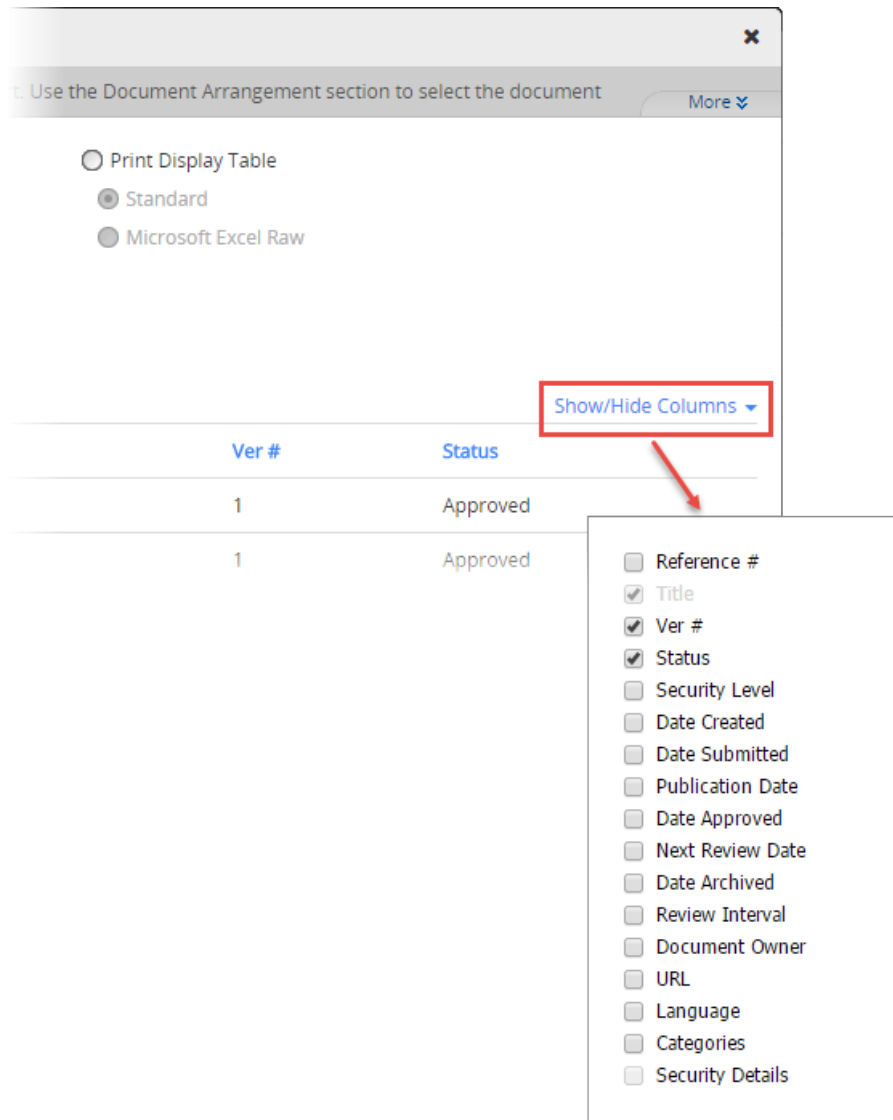
[Cancel](#) [Back](#) [Print Documents](#)

5. Select one of the following outputs for the selected documents:

- **Print Documents:** Automatically opens and prints all selected documents. To change what is printed by default, see [Print Documents Options](#) below. If you select this option, skip step 6.
 - **Print Display Table:** A display table is what is currently displayed in the **Document Arrangement** area, which you can modify (see the next step below). After selecting this option, select **Standard** to create a report containing the document list, or select **Microsoft Excel Raw** to export the list to an Excel (.xls) file.
6. The **Document Arrangement** area controls what document information is included in the report and the document sort order. Do any of the following:
- By default, a Print Multiple Documents report includes the following information about each document listed in the **Document Arrangement** area:
 - Reference number
 - Title
 - Version number
 - Status
 - Date Created
 - Date Submitted
 - Publication Date
 - Date Approved
 - Next Review Date

To change the default report columns, click **Show/Hide Columns**, and then select or click to clear check boxes.

Important: Changing what is displayed in the **Document Arrangement** list does not affect output when **Print Documents** is selected, but it does affect the output for **Print Display Table**. With **Print Display Table** and **Standard** selected, clicking to clear the following columns hides them in the **Document Arrangement** list, but it does not remove them from the standard display table: **Reference #**, **Ver #**, **Review Interval**, **Document Owner**, **URL**. With **Print Display Table** and **Microsoft Excel Raw** selected, all column changes you make directly affect what is included in the exported display table file.



Note: The **Security Details** option functions differently than the other **Show/Hide Columns** options. First, it is only selectable if **Microsoft Excel Raw** is selected. Second, it causes two columns to be added to the display table: **Allowed Access Type** and **Allowed Access**. These two columns will contain information only for documents that have the **Restricted - High** or **Restricted - Severe** security level assigned, and only if one or more other allowed users are selected (for details on security levels, see "Step 7: Security" in the [User's Guide](#)). The **Allowed Access Type** column shows how other allowed users were selected (by department, by job title, or by readers), and the **Allowed Access** column shows the departments, job titles, and readers that were selected. Notice in the example below that a separate row is included for each of a document's **Allowed Access** entities that were selected.

Screenshot...

	A	B	C	D	E	F
1	Title	Ver #	Status	Allowed Access Type	Allowed Access	
2	Account Collections Form	1	Draft	Department	Corporate Headquarters: Accounting	
3	Account Collections Form	1	Draft	Multi-Site (Global) Department Group	Customer Satisfaction Group	
4	Account Collections Form	1	Draft	Reader Group	Corporate Headquarters: Managers	
5	Account Collections Form	1	Draft	Reader	Aguilar, Janice (Accounts Payable Clerk)	
6	Accounts Payable and Cash Distribution	1	Draft			
7	Bad NSF Checks	1	Draft			
8	Invoice Billings	1	Draft			
9	Job Description - Accountant	1	Draft			
10	Performance Evaluation - Accounting Manager	1	Draft			
11	Year End Closing	1	Draft			
12						

- By default, the user sort order in the report is ascending by last name. To change what the users are sorted by, click a different column heading. Click the same column heading again to reverse the sort order.

Note: Changes to the document sort column and sort order directly affect both **Print Display Table** outputs.

7. Do one of the following, depending on what output you've selected:

- **Print Documents:** To start the automated printing of the selected documents, click **Print Documents**.

Important: PolicyTech opens and prints each selected document one after the other. This may take several minutes if many documents are selected. Do not attempt to work with any open document until the printing process has completely finished.

The last thing to be printed is the table of contents page, at which time you'll see the message displayed below.

Printing Complete.

Click OK if you would like to customize the Table of Contents and then print it again.

To use the default table of contents that has already been printed, click **Cancel**, which closes the table of contents.

To edit the default table of contents page, click **OK**, and then make changes as you would with any other Word document within PolicyTech. When finished, print the modified table of contents from within Word.

- **Print Display Table:** 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.

Document List

NAVEX Global powered by policytech

Pages: 3 Generated By: Johnson, Douglas Generated: 09/15/2016 09:27

Document Details

Ref #	Title	Ver #	Status	Date Created	Date Approved	Publication Date	Next Review Date	Date Archived	Document Owner	Categories	Review Interval
13	Job Description - Accountant (v.1)	1	Draft	12/12/2012	Not Approved Yet	Not Approved Yet	No Review Date	Not Archived Yet	Howard, Susan	Policies (Document Type)	12 month(s)
14	Job Description - Accounting Manager (v.1)	1	Draft	11/18/2011	Not Approved Yet	Not Approved Yet	No Review Date	Not Archived Yet	Hansen, Tom	1.0 Law Enforcement Role	12 month(s)
15	Job Description - Accounts Payable Clerk (v.1)	1	Draft	03/13/2013	Not Approved Yet	Not Approved Yet	No Review Date	Not Archived Yet	Howard, Susan	General (Compliance Star)	12 month(s)

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

Ref #	Title	Ver #	Status	Date Created	Date Approved	Publication Date	Next Review Date	Date Archived	Document Owner	Categories	Review Interval
1	233 Anti-Bribery Policy	2	Draft	12/12/2012	Not Approved Yet	Not Approved Yet	No Review Date	Not Archived Yet	Howard, Susan	Policies (Document Type)	12 month(s)
2	3 Bad NSF Checks	1	Draft	11/18/2011	Not Approved Yet	Not Approved Yet	No Review Date	Not Archived Yet	Hansen, Tom	1.0 Law Enforcement Role	12 month(s)
3	5 Capitalization	3	Draft	12/05/2012	Not Approved Yet	Not Approved Yet	No Review Date	Not Archived Yet	Hansen, Tom	General (Compliance Star)	12 month(s)
4	292 Fixed Asset Control	1	Draft	03/13/2013	Not Approved Yet	Not Approved Yet	No Review Date	Not Archived Yet	Howard, Susan	General (Compliance Star)	12 month(s)
5	12 Invoice Billings	1	Draft	11/18/2011	Not Approved Yet	Not Approved Yet	No Review Date	Not Archived Yet	Hansen, Tom	General (Compliance Star)	12 month(s)

Print Documents Options

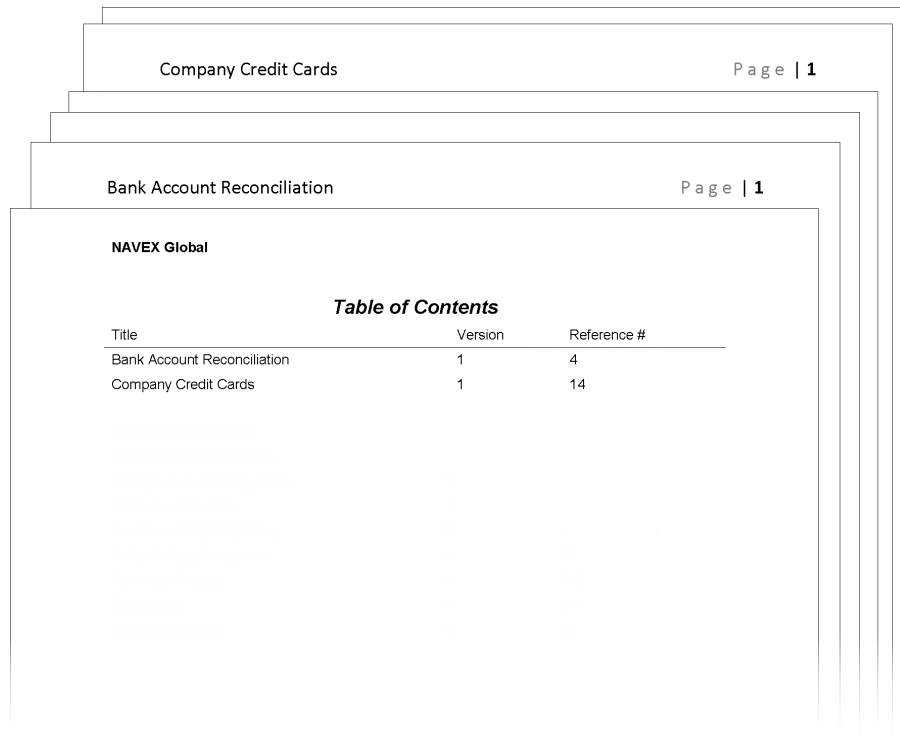
Use the following options to customize what is printed with the selected documents.

Paging Options

When you print multiple documents, PolicyTech adds a table of contents page listing each document printed. The paging options control pagination of the printed material and whether page numbers are displayed in the table of contents.

Click **Paging Options** and then click one of the following:

- Keep Original Paging:** Uses whatever automatic page numbering has been inserted into the documents, restarting pagination for each successive document. Page numbers are not included on the table of contents page, or on properties cover pages, if that option is selected.



- **Continuous Paging:** Starts pagination with the first document in the list and continues with that pagination (does not start over) in each successive document and any attached Word or Excel documents. Page numbers are added to properties cover pages, if included, and for each document listed in the table of contents.

Note: If any of the selected documents contain automatic page numbering with a format similar to "Page 1 of 5," the current page number will be updated to be continuous throughout the print batch, but the "of" number will not. For example, you could see something like "Page 7 of 5."

Company Credit Cards

Page | 4

Bank Account Reconciliation

Page | 1

NAVEX Global

Table of Contents

Title	Version	Reference #	Page
Bank Account Reconciliation	1	4	1
Company Credit Cards	1	14	4

Properties

Select **Properties** if you want a cover page with properties added for each document.

Business Title					
NAVEX Global					
Title	Version	Reference #			
Bank Account Reconciliation	1	4			

Date Created	Date Submitted	Date Approved	Publication Date	Next Review Date	Review Interval
10/21/2010	Not Submitted Yet	Not Approved Yet	Not Approved Yet	No Review Date	12 month(s)

Update Requests

None

Document Owner

Corporate Headquarters: Hansen, Tom (Accounting Manager)

Document Creator

Corporate Headquarters: Hansen, Tom (Accounting Manager)

Assigned Proxy Author

Writers

Corporate Headquarters: Cash, Jordon (Accounts Payable Clerk) Upcoming Task

Reviewers

Corporate Headquarters: Stoker, Brent (Director of Engineering) Upcoming Task

Corporate Headquarters: Breen, Darren (Personnel Manager) Upcoming Task

Approvers

Corporate Headquarters: Gatos, Will (Chief Information Officer) Upcoming Task

Categories

Document Type

Policies

Affected Department(s)

Corporate Headquarters: Accounting

Keywords

None

To change which properties are included on each cover page, click **More**, and then, in the **Select Overview Items Below** area, click to clear the check boxes of the properties you don't want included. Click **OK**.

To include more information than just properties on the cover page, click **More**, select additional items from the menu on the left, and then click **OK**.

Cover Page Options

☒ Overview

☒ Document History

☐ Workflow Comments

☐ Links

☐ Security

☐ Discussions

Select Overview Items Below

☒ Business Title

☒ Title, Version, & Reference #

☒ Dates

☒ Update Requests

☒ Document Owner

☒ Document Creator

☒ Assigned Proxy Author

☒ Assignees

☒ Categories

☒ Affected Department(s)

☒ Keywords

☒ URL

☒ Language

OK

Attachments

If one or more of the selected documents has attached Word or Excel files, select **Attachments** to have those documents printed as well.

Important: Only Word and Excel attachments will be printed. Any other attachment file types will be skipped.

Report: Email Bounce Backs by Document

Description

Shows which task emails were undeliverable for the selected documents or questionnaires.

Note: If, in the **Bulk Mail Settings** tab of **Email** preferences, the **Distribute Bulk mail by BCC** setting has been selected, undeliverable emails cannot be logged by PolicyTech or included in this report.

Available to users with the following roles or permissions:

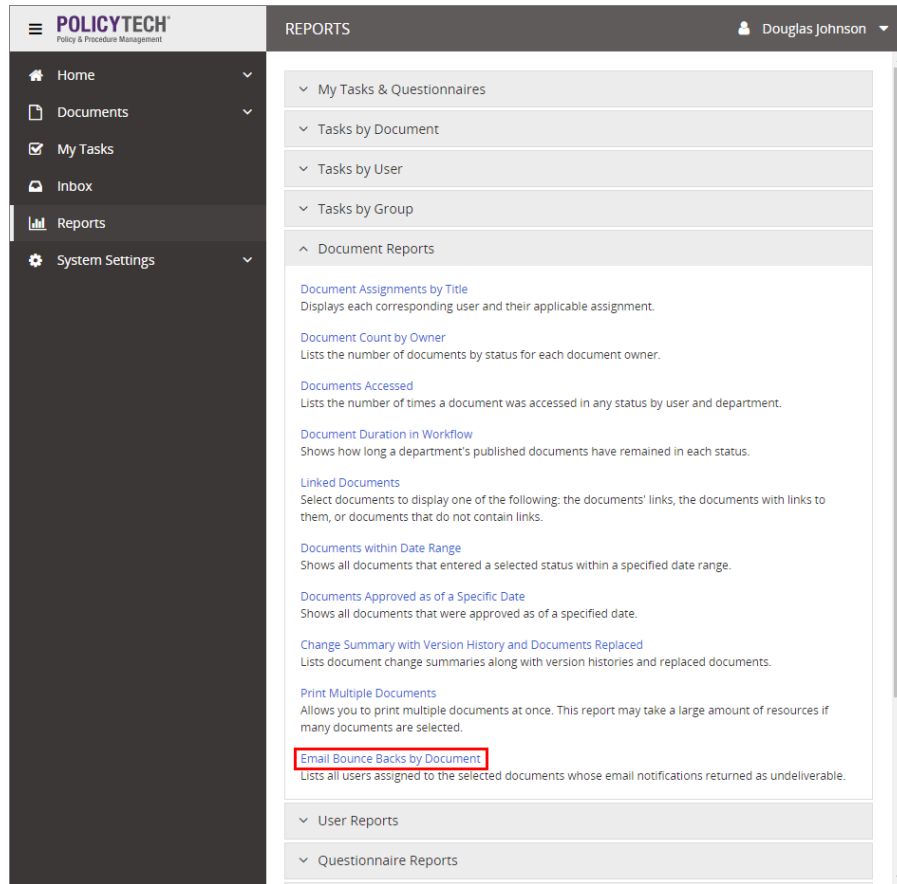
Document Owner, Proxy Author, Report Manager, Administrator

Sample Report:

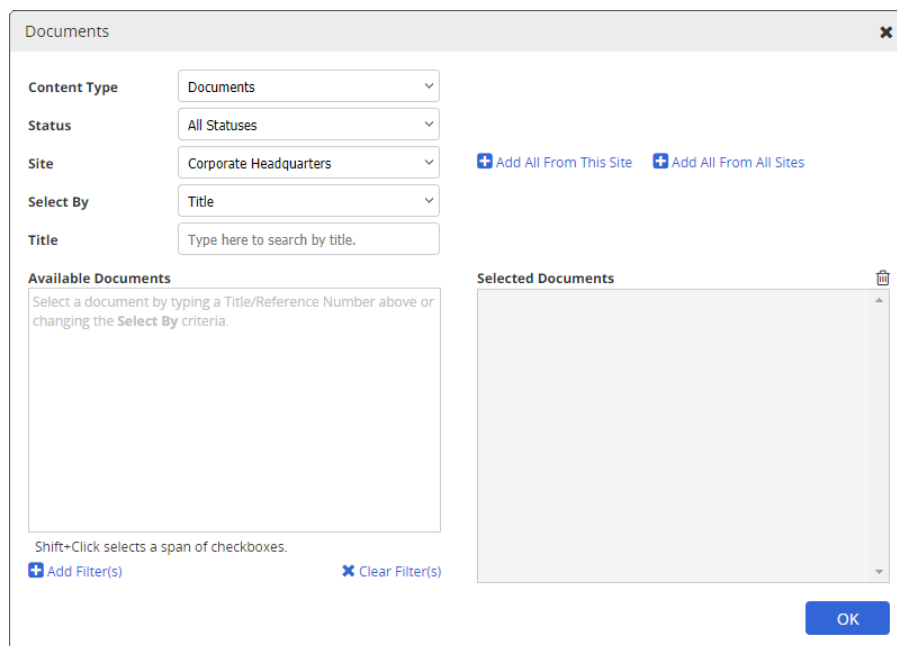
First Name	Last Name	Failed Email	Current Email	User Type	Site	Department	Ref #	Title (Version)	Version	Bounce Back Date	Bounce Back Reason	Message
Tawna	Gifford	tgifford@somecompany.com		User	Corporate/Accountin			7 Cash Receipts (v.1)	1	2014/07/29 7:28 AM	Email address not found	Received: from VMTE:
Tom	Hansen	thansen@somecompany.com		User	Corporate/Administr			7 Cash Receipts (v.1)	1	2014/07/26 6:08 PM	Other	Received: from VMTE:
Susan	Howard	soward@somecompany.com	susanhoward@somecon	User	Corporate/Administr			7 Cash Receipts (v.1)	1	2014/07/25 10:08 PM	Email delayed	Received: from VMTE:
Jordan	Cash	jcash@somecompany.com		User	Corporate/Accountin			7 Cash Receipts (v.1)	1	2014/07/25 8:28 AM	Domain not found	Received: from VMTE:

How to Generate

1. Click **Reports**.
2. Click **Document Reports**, and then click **Email Bounce Backs by Document**.

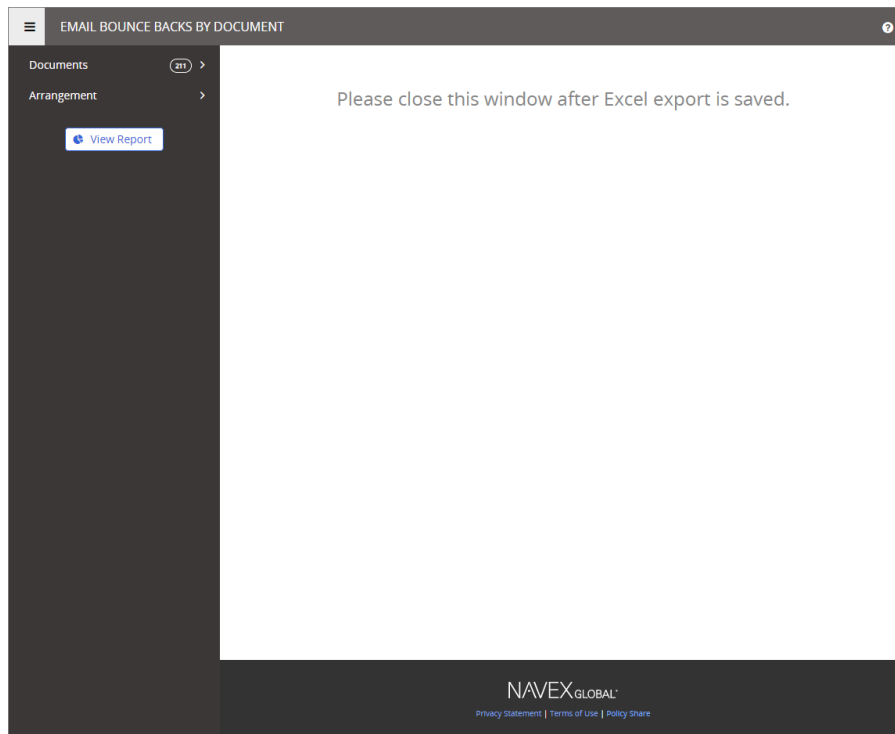


3. Select documents or questionnaires to include in the report (see [Selecting Documents](#) for help), and then click **OK**.



All options available for this report are displayed on the left. Notice that the number of currently selected documents/questionnaires is displayed after the **Documents** option, which you can click anytime to change your document/questionnaire selection.

Note: If you change your document/questionnaire selection after clicking **View Report**, click **View Report** again to refresh the report contents.



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 the **Ref #** check box.

Arrangement ✕

Documents Found: 211

Show/Hide Columns ▾

☒ Reference #

☒ Title

Reference #	Title
52	Account Collection Process (v.1)
320	Account Collection Process (v.1)
320	Account Collection Process (v.2)
1	Account Collections Form (v.1)
2	Accounts Payable and Cash Distribution (v.1)
67	Americans with Disabilities Act (v.1)
86	Assembly Manuals (v.1)
3	Bad NSF Checks (v.1)
4	Bank Account Reconciliation (v.1)
53	Bank Loan Applications (v.1)

⏪ ⏩ Page 1 of 22 ⏪ ⏩ Records 1 - 10

OK

- By default, the user sort order in the report is ascending by last name. To change what the users are sorted by, click a different column heading. Click the same column heading again to reverse the sort order.

5. Click **View Report**, and then follow the prompts to download and open the Excel file.

First Name	Last Name	Failed Email	Current Email	User Type	Site	Department	Ref #	Title (Version)	Version	Bounce Back Date	Bounce Back Reason	Message
Tawna	Gifford	tgifford@somecompany.com		User	Corporate/Accountin		7	Cash Receipts (v.1)	1	2014/07/29 7:28 AM	Email address not found	Received: from VMTE:
Tom	Hansen	thansen@somecompany.com		User	Corporate/Administr		7	Cash Receipts (v.1)	1	2014/07/26 6:08 PM	Other	Received: from VMTE:
Susan	Howard	showard@somecompany.com	susanhoward@somecon	User	Corporate/Administr		7	Cash Receipts (v.1)	1	2014/07/25 10:08 PM	Email delayed	Received: from VMTE:
Jordon	Cash	jcash@somecompany.com		User	Corporate/Accountin		7	Cash Receipts (v.1)	1	2014/07/25 8:28 AM	Domain not found	Received: from VMTE:

User Reports

The **User Reports** category includes the following:

[Document Assignments by User](#)

[Documents Accessed by User](#)

[Users Canceled Mark as Read](#)

[User Permissions](#)

[Users with Bounce Back Emails](#)

[Dedicated Licenses](#)

Report: Document Assignments by User

Description

Shows all document and questionnaire assignments for the selected users.


Available to users with the following roles or permissions:

Manager, Report Manager, Administrator

Sample Report:

Document Assignments by User

NAVEX Global

powered by  policytech

Pages: 3

Generated By: Douglas Johnson

Generated: 11/07/2014 10:13

Document Assignments by User

1. Hansen, Tom (Accounting Manager)

Site: Corporate
Headquarters

Department: Accounting

Assignments by User (89)

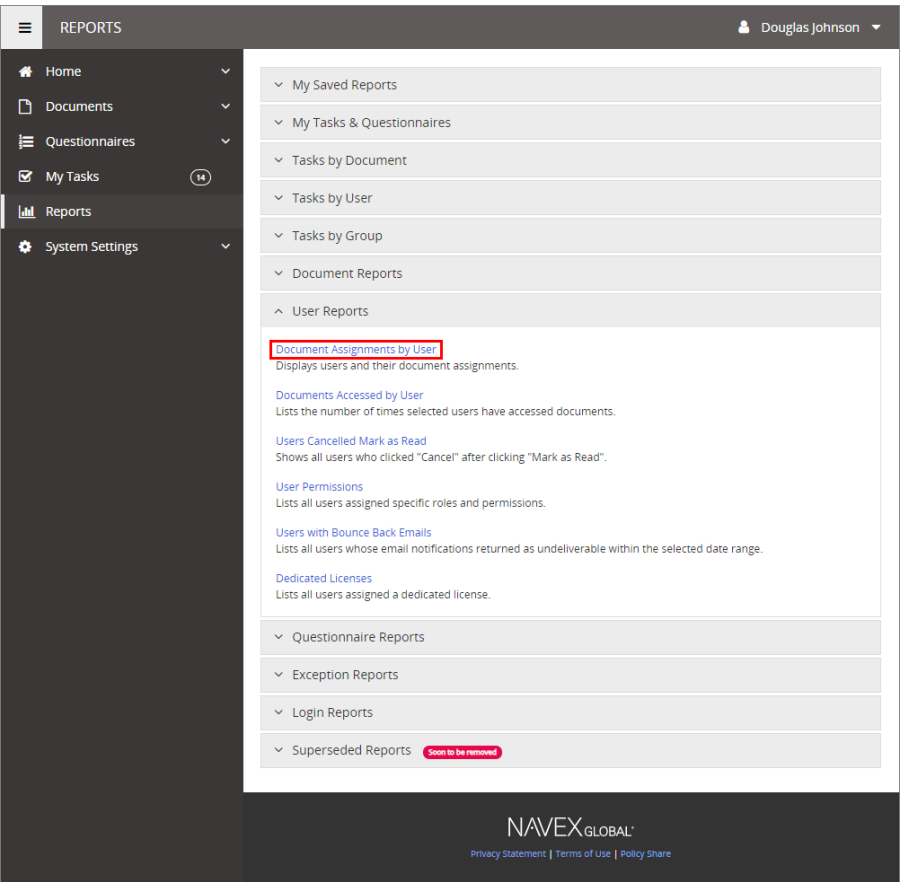
	Ref. #	Title (Version)	Task Type
1.	2	Accounts Payable and Cash Distribution (v.1)	Document Owner
2.	258	Audit Schedule (v.1)	Document Owner
3.	3	Bad NSF Checks (v.1)	Document Owner
4.	327	Bank Account Reconciliation - South Branch (v.1)	Document Owner
5.	4	Bank Account Reconciliation (v.1)	Document Owner
6.	4	Bank Account Reconciliation (v.2)	Document Owner
7.	5	Capitalization (v.1)	Document Owner
8.	5	Capitalization (v.2)	Document Owner
9.	6	Cash Drawers (v.1)	Document Owner
10.	7	Cash Receipts (v.1)	Document Owner
11.	8	Chart of Accounts (v.1)	Document Owner
12.	9	Check Requests (v.1)	Document Owner
13.	10	Check Signing Authority (v.1)	Document Owner
14.	12	Invoice Billings (v.1)	Document Owner
15.	13	Job Description - Accountant (v.1)	Document Owner
16.	14	Job Description - Accounting Manager (v.1)	Document Owner
17.	15	Job Description - Accounts Payable Clerk (v.1)	Document Owner
18.	16	Job Description - Accounts Receivable Clerk (v.1)	Document Owner
19.	17	Performance Evaluation - Accountant (v.1)	Document Owner
20.	18	Performance Evaluation - Accounting Manager (v.1)	Document Owner
21.	19	Performance Evaluation - Accounts Payable Clerk (v.1)	Document Owner
22.	20	Performance Evaluation - Accounts Receivable Clerk (v.1)	Document Owner
23.	21	Petty Cash (v.1)	Document Owner
24.	22	Unsigned or Partial Pay (v.1)	Document Owner
25.	313	Vacation Policy (v.1)	Document Owner
26.	23	Year End Closing (v.1)	Document Owner

1/3

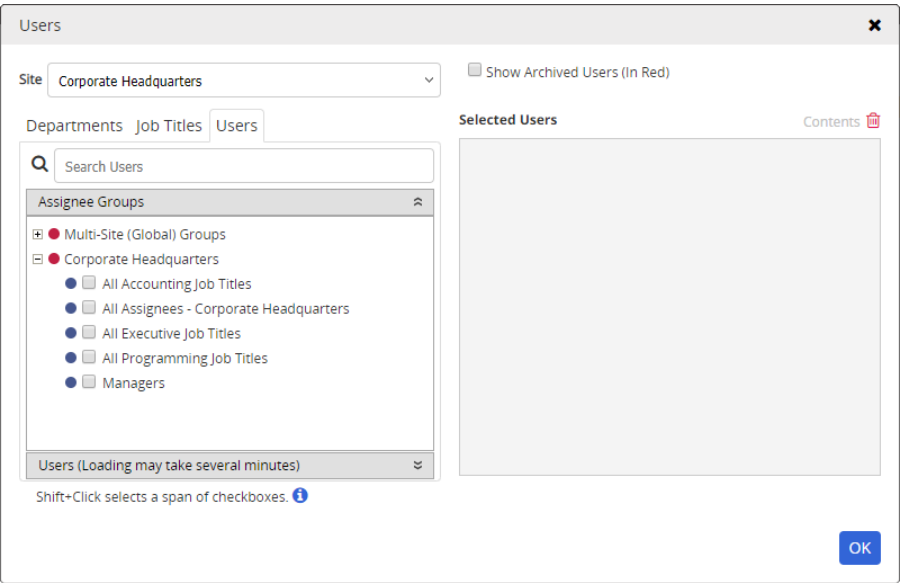
1/3

How to Generate

1. Click **Reports**.
2. Click **User Reports**, and then click **Document Assignments by User**.

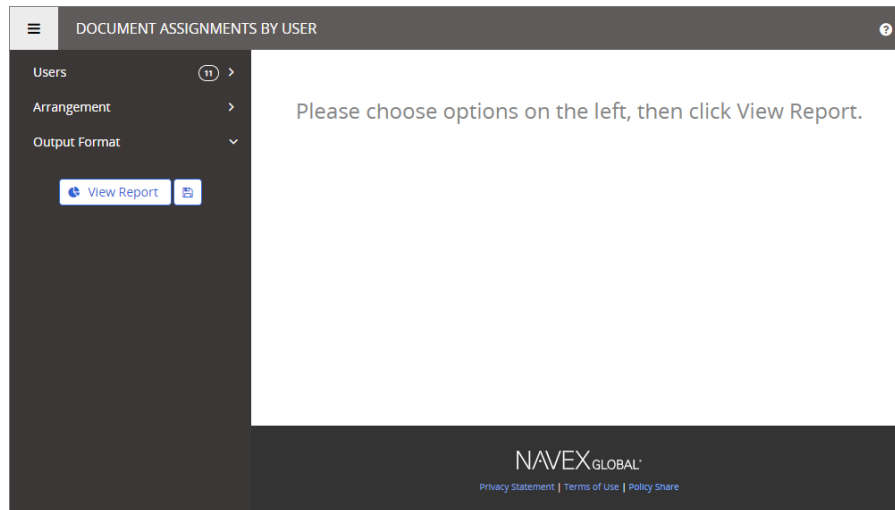


3. Select the users you want included in the report (see [Selecting Users](#) for help).



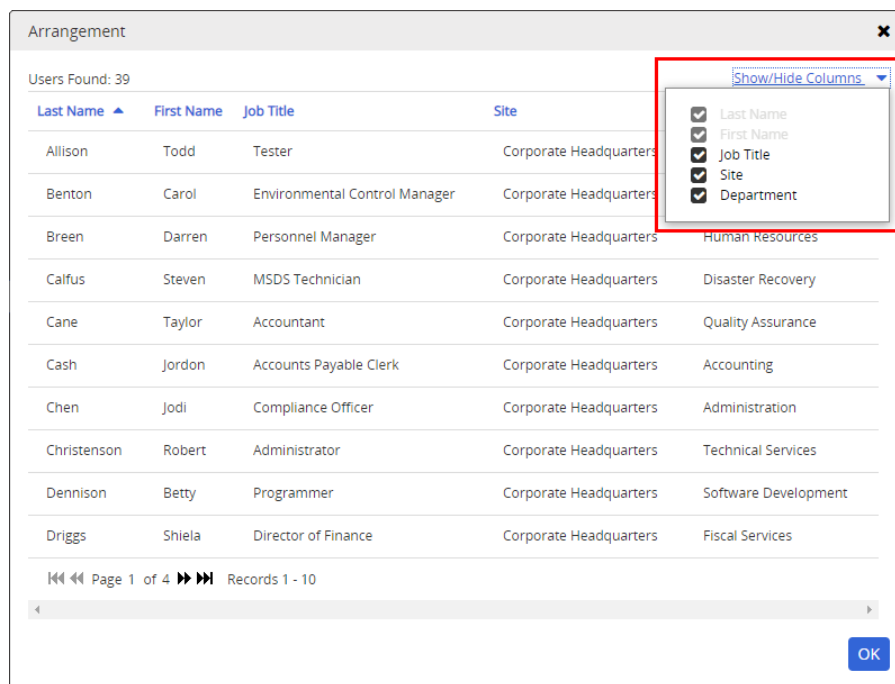
All options available for this report are displayed on the left. Notice that the number of currently selected users is displayed after the **Users** option, which you can click anytime to change your user selection.

Note: If you change your user selection after clicking **View Report**, click **View Report** again to refresh the report contents.

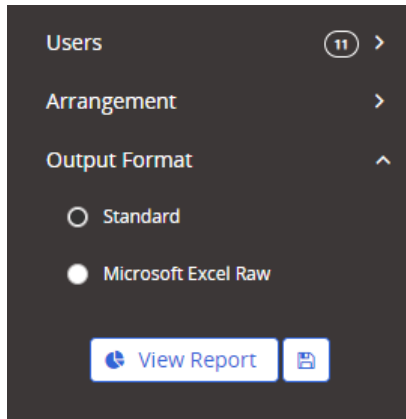



4. (Optional) Click **Arrangement** and do any of the following:

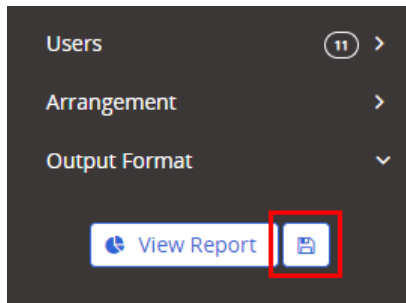
- To change the default report columns, click **Show/Hide Columns**, and then click to clear a check box.



- By default, the user sort order in the report is ascending by last name. To change what the users are sorted by, click a different column heading. Click the same column heading again to reverse the sort order.
5. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.



6. (Optional) To save the current user selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

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.

DOCUMENT ASSIGNMENTS BY USER

Users | Arrangement | Output Format | View Report

NAVEX Global | powered by policytech

Pages: 14 | Generated By: Douglas Johnson | Generated: 10/31/2018 2:55 PM

Document Assignments by User

1. Addison, Victoria (Accountant) | Site: Corporate Headquarters | Department: Accounting

Assignments by User (13)

Ref. #	Title (Version)	Task Type
1. 320	Account Collection Process (v.1)	Assignee
2. 320	Account Collection Process (v.2)	Assignee
3. 1	Account Collections Form (v.1)	Assignee
4. 2	Accounts Payable and Cash Distribution (v.1)	Assignee
5. 314	Conflict of Interest Survey (v.2)	Assignee
6. 343	Fair Trade Policy (v.1)	Assignee
7. 340	Overtime Policy - United States (v.1)	Assignee
8. 316	Security Policy (v.1)	Assignee
9. 316	Security Policy (v.2)	Assignee
10. 321	Site Security (v.1)	Assignee
11. 318	Vacation Policy (v.1)	Assignee
12. 323	Vacation Policy (v.1)	Assignee
13. 319	Best Accounting Practices (v.1)	Writer

2. Cash, Jordan (Accounts Payable Clerk) | Site: Corporate Headquarters | Department: Accounting

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I
1	First Name	Last Name	Job Title	Site	Department	Ref. #	Title (Version)	Version Number	Assignment Type
2	Tom	Hansen	Accountin Corp	Accounting		2	Accounts Payab	1	Document Owner
3	Tom	Hansen	Accountin Corp	Accounting		3	Bad NSF Check	1	Document Owner
4	Tom	Hansen	Accountin Corp	Accounting		4	Bank Account R	1	Document Owner
5	Tom	Hansen	Accountin Corp	Accounting		5	Capitalization (v.1)	1	Document Owner

Report: Documents Accessed by User

Description


Shows which documents and questionnaires were accessed by the selected users within the selected date range.

Available to users with the following roles or permissions:

Manager, Report Manager, Administrator

Sample Report:

Documents Accessed by User

NAVEX Global Filter By: Last 30 Days (10/08/2014 to 11/07/2014) powered by  policytech

Pages: 5 Generated By: Douglas Johnson Generated: 11/07/2014 09:49

Summary

Number of Users	Access Total	Average Access per User
6	117	20

Documents Accessed by User

1. Cash, Jordon (Accounts Payable Clerk)
Site: Corporate Headquarters
Department: Accounting

Accessed
1

Document Access Log (1)

Ref. #	Title (Version)	Workflow Step Accessed	Access Date/Time
1. 1	Account Collections Form (v.1)	Published	11/04/2014 09:19

2. Gifford, Tawna (Accounts Receivable Clerk)
Site: Corporate Headquarters
Department: Accounting

Accessed
24

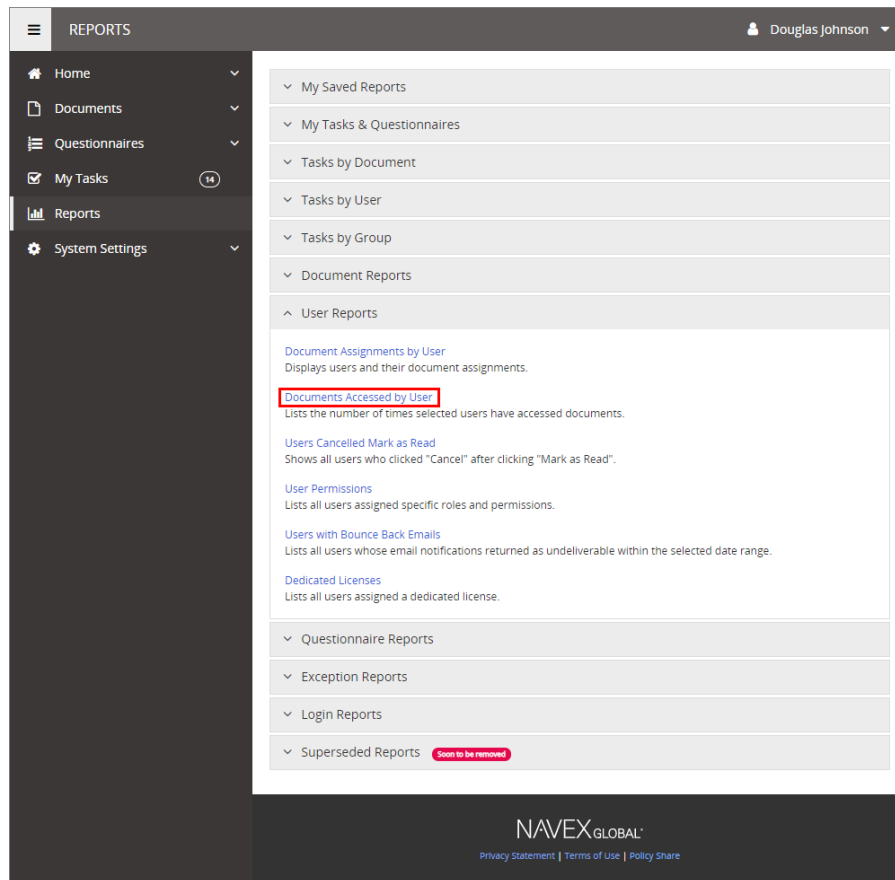
Document Access Log (24)

Ref. #	Title (Version)	Workflow Step Accessed	Access Date/Time
1. 1	Account Collections Form (v.1)	Published	11/04/2014 09:50
2. 1	Account Collections Form (v.1)	Published	11/04/2014 09:25
3. 1	Account Collections Form (v.1)	Published	11/04/2014 09:16
4. 216	Bank Account Reconciliation (v.1)	Published	10/30/2014 08:15
5. 243	Building Security (v.1)	Published	10/30/2014 08:16
6. 274	Capitilization (v.2)	Published	10/30/2014 08:15
7. 4	Cash Receipts (v.1)	Draft	11/05/2014 14:08
8. 280	Chart of Accounts (v.1)	Published	10/30/2014 08:14
9. 244	Family and Medical Leave (v.1)	Published	10/30/2014 08:15
10. 332	Inventory Sheet (v.2)	Published	11/04/2014 09:58
11. 331	Invoice Billings (v.1)	Published	10/30/2014 07:57

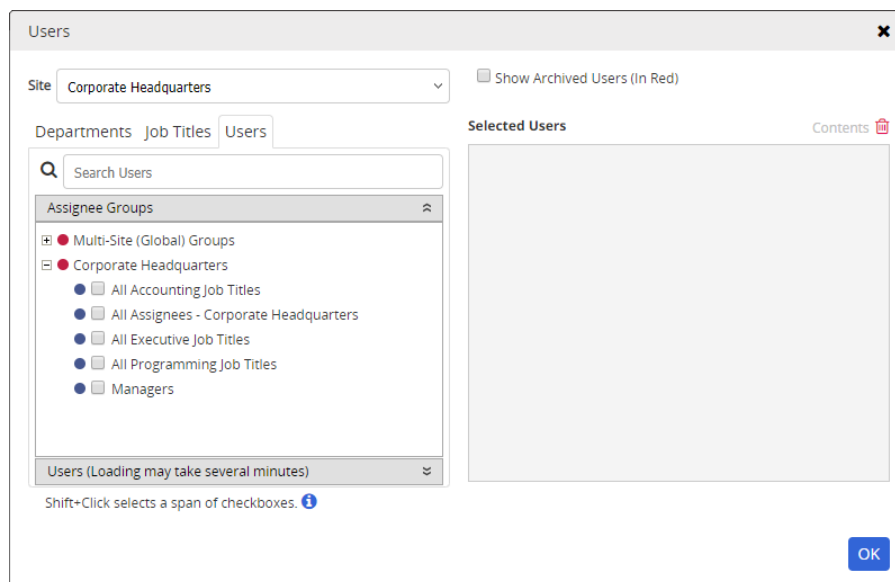
1/5

How to Generate

1. Click **Reports**.
2. Click **User Reports**, and then click **Documents Accessed by User**.

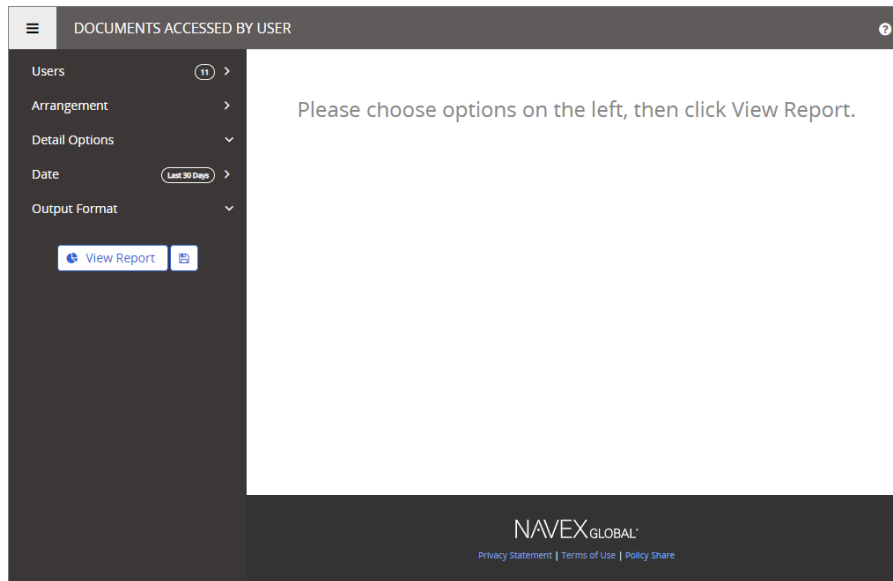


3. Select the users you want included in the report (see [Selecting Users](#) for help).



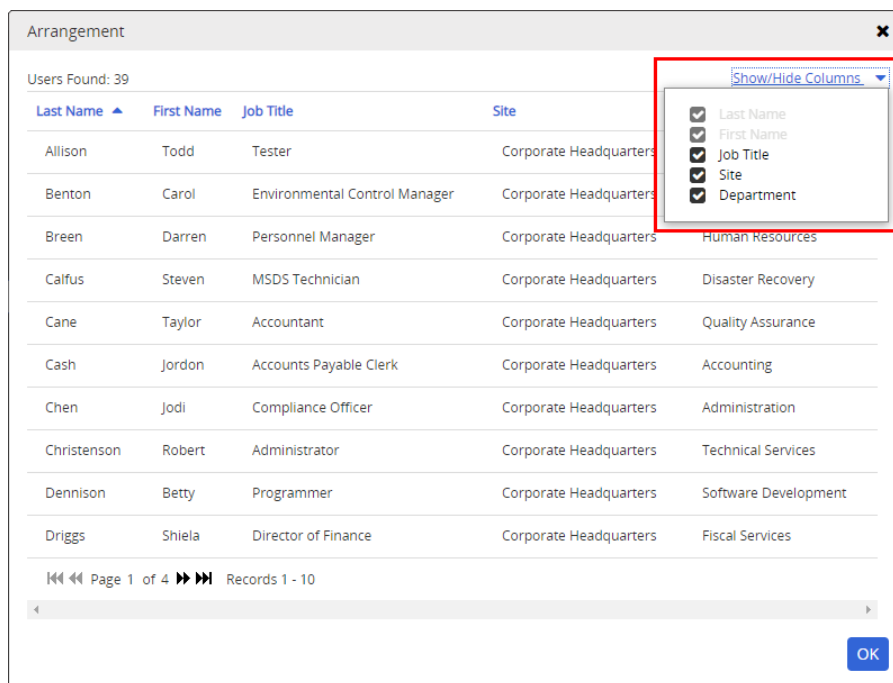
All options available for this report are displayed on the left. Notice that the number of currently selected users is displayed after the **Users** option, which you can click anytime to change your user selection.

Note: If you change your user selection after clicking **View Report**, click **View Report** again to refresh the report contents.



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 user sort order in the report is ascending by last name. To change what the users are sorted by, click a different column heading. Click the same column heading again to reverse the sort order.

5. (Optional) Click **Detail Options**, and then select any of the following:

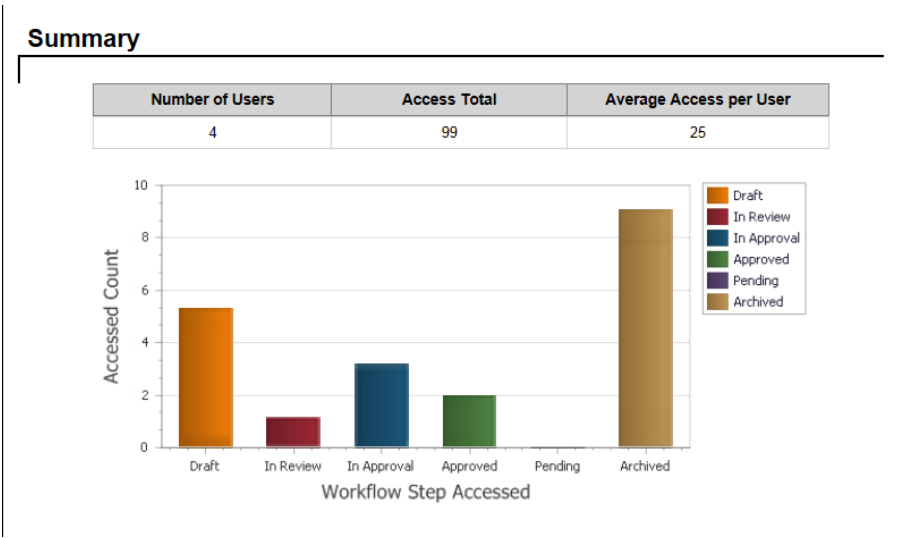
The screenshot shows a sidebar menu with the following items:

- Users (11) >
- Arrangement >
- Detail Options ^
- ☒ Include Document Details
- ☐ Include Graphs
- Date Last 30 Days >
- Output Format v
- View Report (button)
- Download (button)

- **Include Document Details:** Shows the tasks associated with each document or questionnaire in the report.

Documents Accessed by User			
1. Cash, Jordan (Accounts Payable Clerk)			
	<u>Site Name</u>	<u>Department</u>	<u>Accessed</u>
	Corporate Headquarters	Accounting	7
Document Access Log (7)			
	<u>Ref. #</u>	<u>Title (Version)</u>	<u>Workflow Step</u>
			<u>Accessed</u>
1.	233	Anti-Bribery Policy (v.1)	Published
2.	233	Anti-Bribery Policy (v.1)	Published
3.	6	Cash Drawers (v.2)	Published
4.	232	Conflict of Interest Policy (v.1)	Published
5.	232	Conflict of Interest Policy (v.1)	Published
6.	134	Pay and Payroll Matters (v.1)	Published
7.	140	Workplace Rules & Guidelines (v.2)	Published

- **Include Graphs:** Adds a graph to the report's **Summary** area. The graph shows the number of days the selected users' tasks have been waiting for completion.



6. (Optional) To show only those instances of document/questionnaire access that fall within a certain date range, click **Date**, select a date range, and then click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.

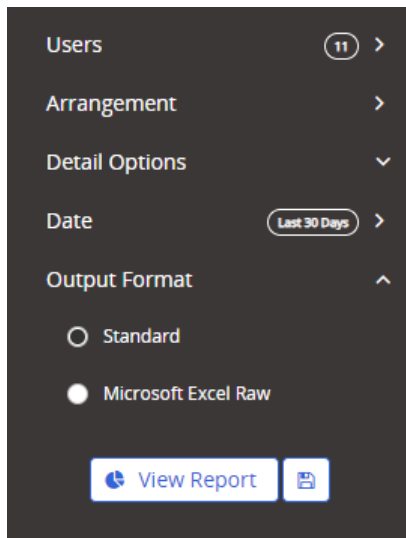
Date Range


Date Range All Dates ▼

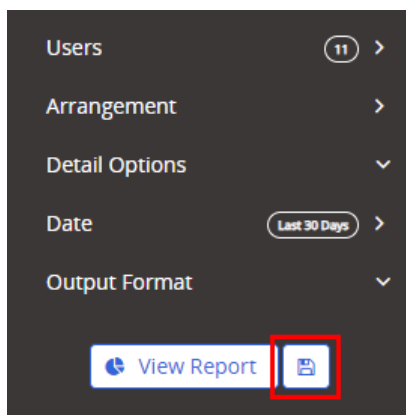
- All Dates
- Last 30 Days
- Last 60 Days
- Last 90 Days**
- Last Month
- Last Quarter
- Last 6 Months
- Last 12 Months
- Previous Year
- Custom Range

OK

7. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.



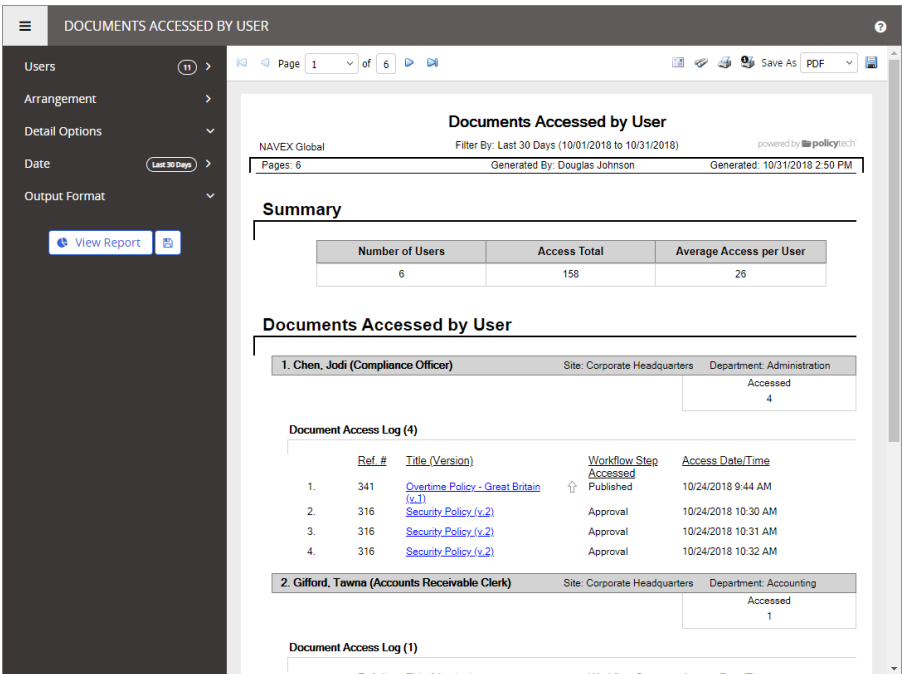
8. (Optional) To save the current user selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

9. 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**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J
1	First Name	Last Name	Job Title	Site	Department	Ref. #	Title (Version)	Version Number	Workflow Step Accessed	Date/Time
2	Jordon	Cash	Accou Corp	Accounting		1	Account Collec	1	Published	11/04/2014 09:19
3	Tawna	Gifford	Accou Corp	Accounting		4	Bank Account I	2	Draft	11/05/2014 14:08
4	Tawna	Gifford	Accou Corp	Accounting		331	Family and Mex	1	Published	10/30/2014 07:57

Report: Users Canceled Mark as Read


Description

Shows all users who clicked **Mark as Read** in a document or **Submit Answers** in a questionnaire and then, instead of confirming the action, clicked **Cancel**.

Available to users with the following roles or permissions:

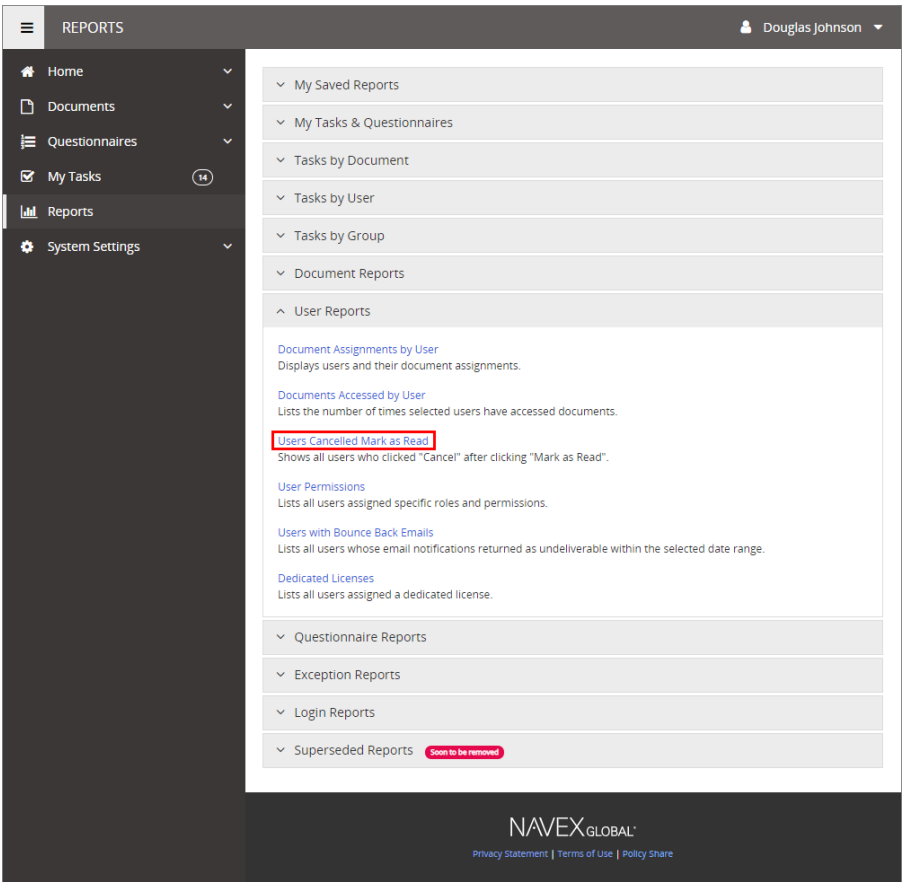
Manager, Report Manager, Administrator

Sample Report:

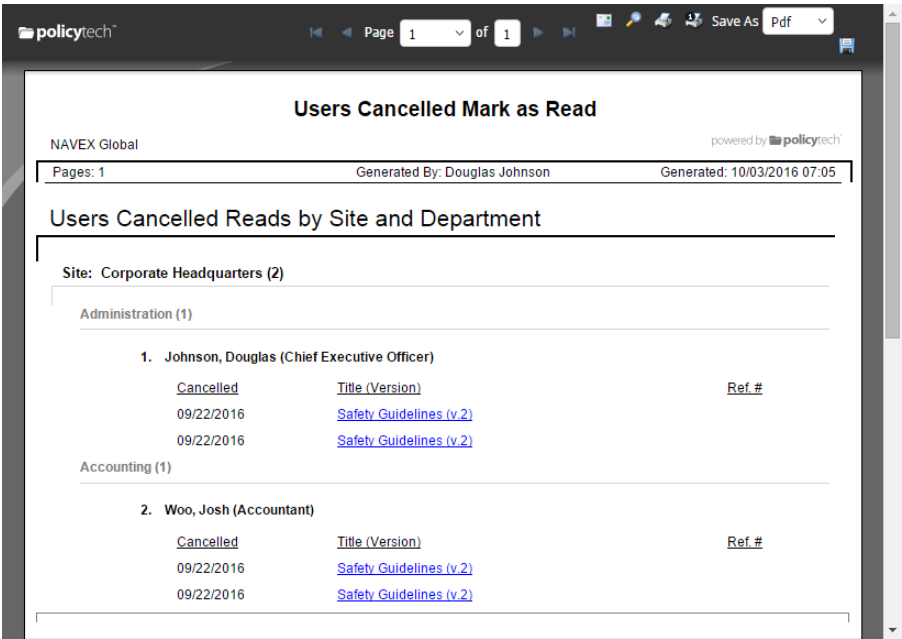
Users Cancelled Mark as Read		
NAVEX Global	powered by 	
Pages: 1	Generated By: Susan Howard	Generated: 04/17/2013 4:40 PM
User-cancelled "Mark as Read"		
Site: Corporate Headquarters (1)		
Administration (1)		
1. Howard, Susan (Document, Control Administrator)		
<u>Cancelled</u>	<u>Title (Version)</u>	<u>Ref. #</u>
04/12/2013 10:35 AM	Family and Medical Leave (v.1)	291

How to Generate

- 1. Click **Reports**.
- 2. Click **User Reports**, and then click **Users Cancelled Mark As Read**.



The report opens immediately in a separate browser window.



Report: User Permissions

Description

Shows the number of users assigned each role and system permission.


Available to users with the following roles or permissions:

Report Manager, Administrator, Company/User

Sample Report:

User Permissions

NAVEX Global

powered by 

Pages: 7

Generated By: Susan Howard

04/17/2013 4:46 PM

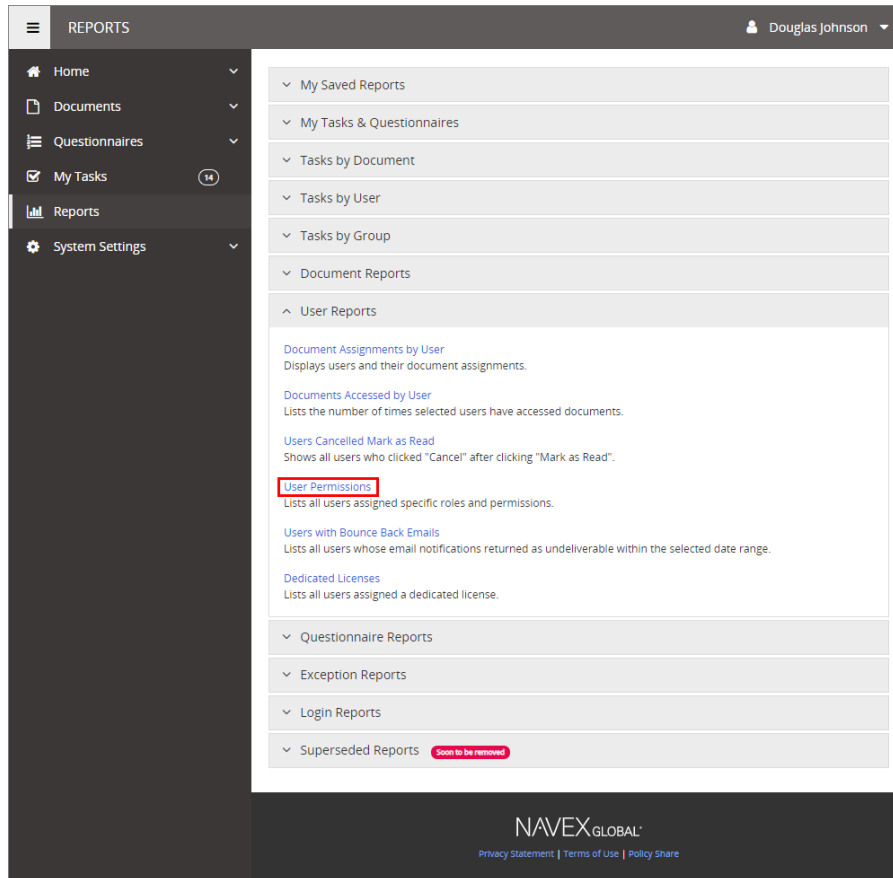
Summary

Assigned Permissions			
System Permissions	Number of Users	Document Roles	Number of Users
All Sites		Document Owner	22
Category Owner	0	Approves Own Documents	4
Document Control Administrator	2	Writer	22
Company / User	0	Reviewer	22
System / IT	0	Approver	8
Report Manager	0	Pending Documents	2
Access Site	0	Reader	49
View Docs All Departments	0	Archived Documents	1
		Template	0
Archive		Proxy Author	
Category Owner	0	Assigned Proxy Authors	1
Document Control Administrator	0	Document Owners with Proxy Authors	1
Company / User	0		
Report Manager	0		
Access Site	0		
Department Manager	0		
Corporate Headquarters			
Category Owner	0		
Document Control Administrator	0		
Company / User	0		
Report Manager	0		
Access Site	0		
Department Manager	0		
Manufacturing			
Category Owner	0		
Document Control Administrator	0		

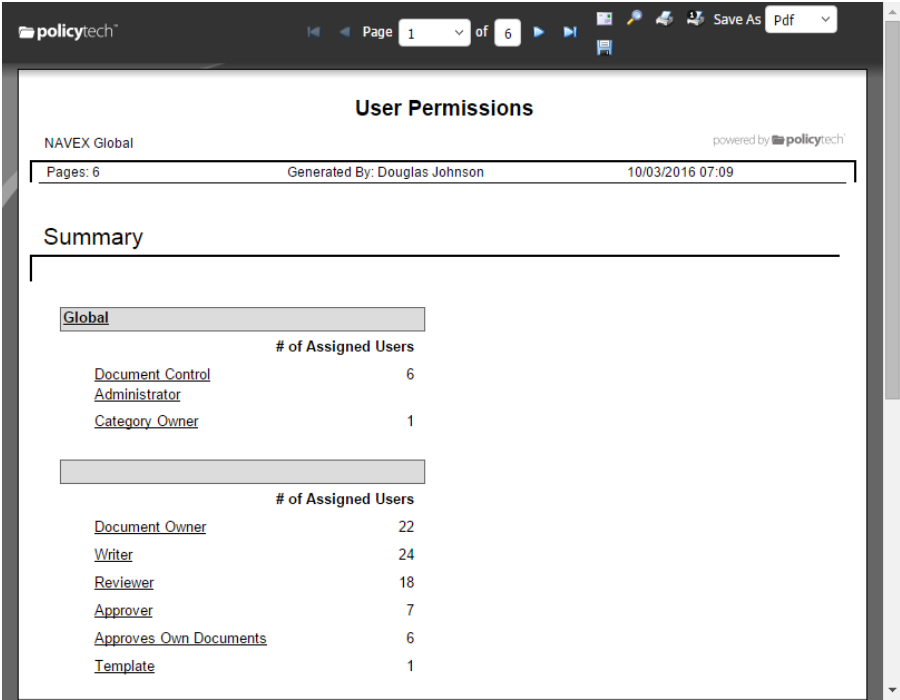
1/7

How to Generate

1. Click **Reports**.
2. Click **User Reports**, and then click **User Permissions**.



The report opens immediately in a separate browser window.



Report: Users with Bounce Back Emails

Description

Shows which task emails were undeliverable for the selected readers during a specified time period.

Note: If, in the **Bulk Mail Settings** tab of **Email** preferences, the **Distribute Bulk mail by BCC** setting has been selected, undeliverable emails cannot be logged by PolicyTech or included in this report.

Available to users with the following roles or permissions:

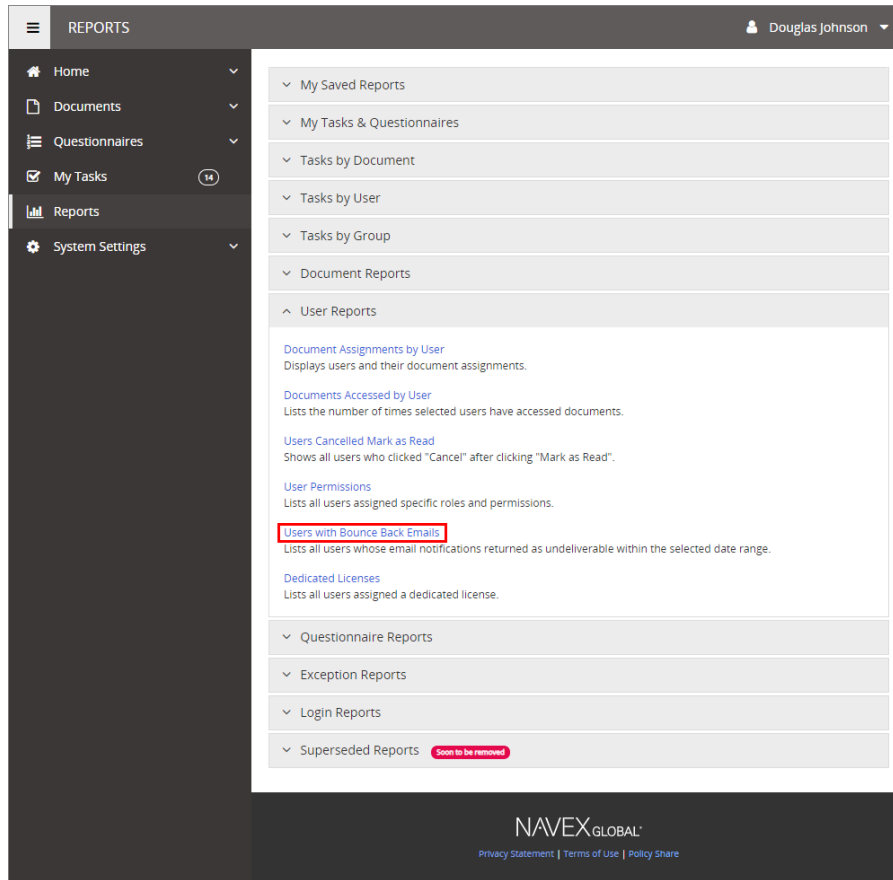
Report Manager, Administrator

Sample Report:

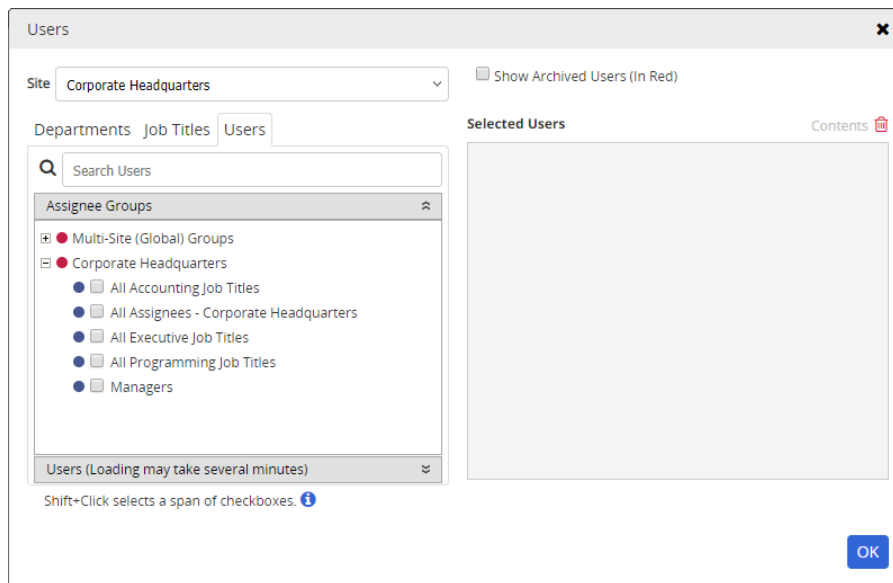
First Name	Last Name	Failed Email	Current Email	User Type	Site	Department/Ref.	#	Title (Version)	Version	Bounce Back Date	Bounce Back Reason	Message
Tawna	Gifford	tgifford@somecompany.com		User	Corporate/Accountin		7	Cash Receipts (v.1)	1	2014/07/29 7:28 AM	Email address not found	Received: from VMTE:
Tom	Hansen	thansen@somecompany.com		User	Corporate/Administr		7	Cash Receipts (v.1)	1	2014/07/25 6:08 PM	Other	Received: from VMTE:
Susan	Howard	showard@somecompany.com	susanhoward@somecon	User	Corporate/Administr		7	Cash Receipts (v.1)	1	2014/07/25 10:08 PM	Email delayed	Received: from VMTE:
Jordan	Cash	jcash@somecompany.com		User	Corporate/Accountin		7	Cash Receipts (v.1)	1	2014/07/25 8:28 AM	Domain not found	Received: from VMTE:

How to Generate

1. Click **Reports**.
2. Click **User Reports**, and then click **Users with Bounce Back Emails**.

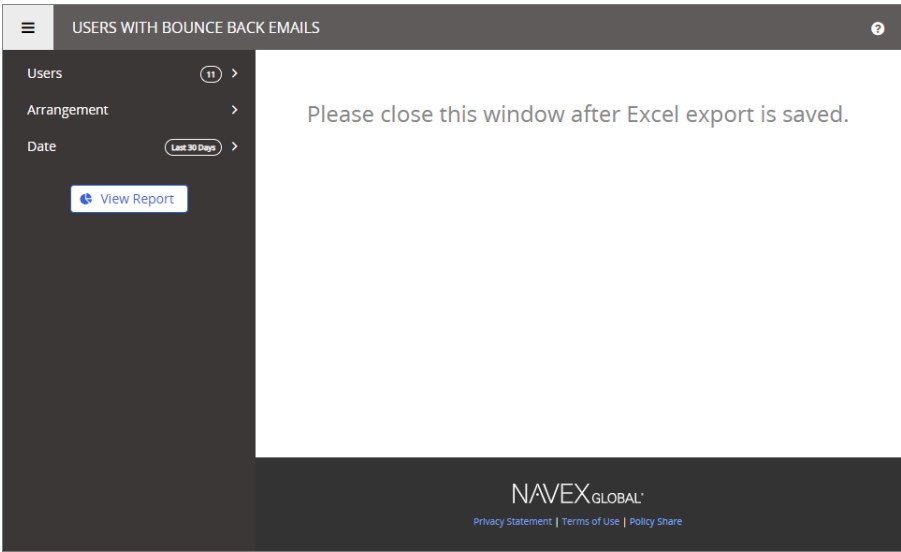


3. Select the users you want included in the report (see [Selecting Users](#) for help).



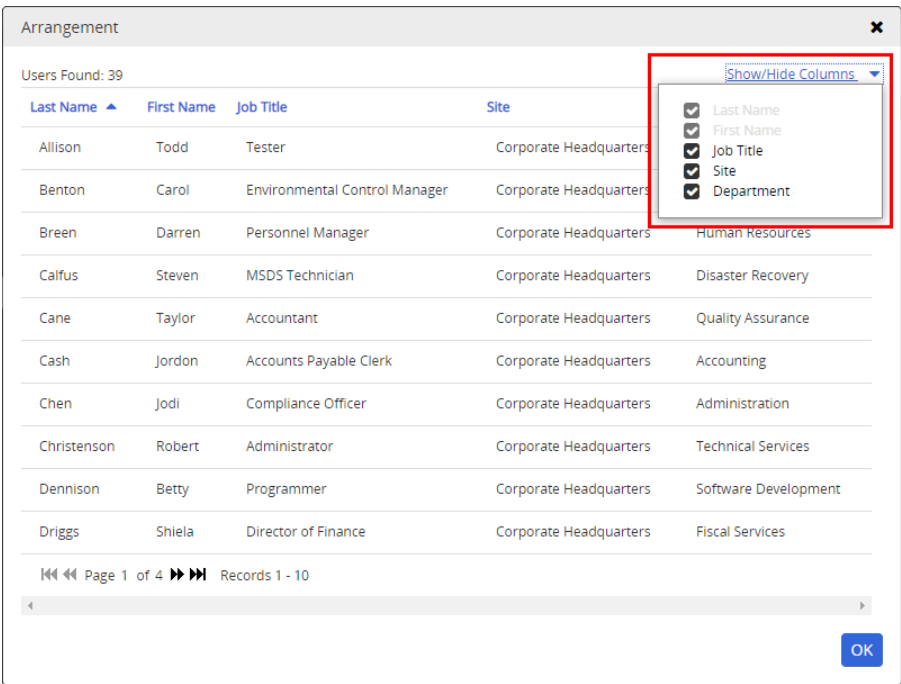
All options available for this report are displayed on the left. Notice that the number of currently selected users is displayed after the **Users** option, which you can click anytime to change your user selection.

Note: If you change your user selection after clicking **View Report**, click **View Report** again to refresh the report contents.



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 user sort order in the report is ascending by last name. To change what the users are sorted by, click a different column heading. Click the same column heading again to reverse the sort order.
- (Optional) To show only those bounce back email instances that fall within a certain date range, click **Date**, select a date range, and then click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.

- Click **View Report**, and then follow the prompts to download and open the Excel file.

First Name	Last Name	Failed Email	Current Email	User Type	Site	Department	Ref. #	Title (Version)	Version	Bounce Back Date	Bounce Back Reason	Message
Tawna	Gifford	tgifford@somecompany.com		User	Corporate/Accountin			7 Cash Receipts (v.1)	1	2014/07/29 7:28 AM	Email address not found	Received from VMTE
Tom	Hansen	thansen@somecompany.com		User	Corporate/Administr			7 Cash Receipts (v.1)	1	2014/07/26 6:08 PM	Other	Received from VMTE
Susan	Howard	showard@somecompany.com	susanhoward@somecon	User	Corporate/Administr			7 Cash Receipts (v.1)	1	2014/07/25 10:08 PM	Email delayed	Received from VMTE
Jordan	Cash	jcash@somecompany.com		User	Corporate/Accountin			7 Cash Receipts (v.1)	1	2014/07/25 8:28 AM	Domain not found	Received from VMTE

Report: Dedicated Licenses

Description

Shows a list of users assigned dedicated licenses.

Available to users with the following roles or permissions:

Administrator

Sample Report:

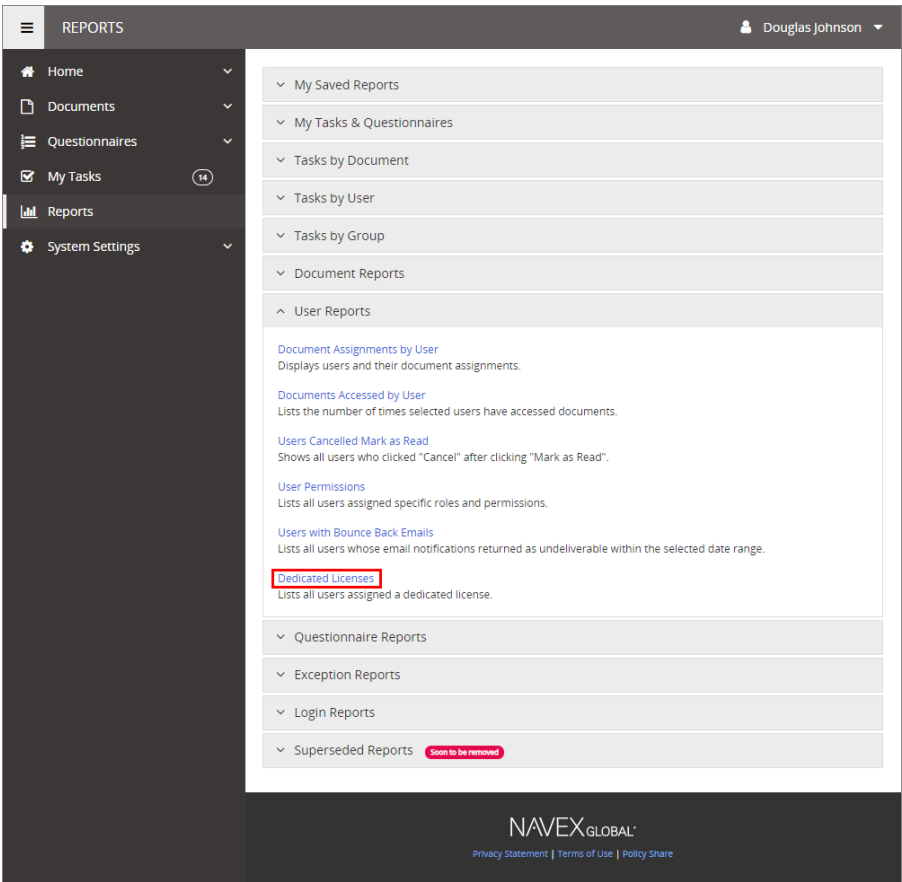
Dedicated Licenses

First Name	Last Name	Email Address	Job Title	Department	Site
Darren	Breen		HR Director	Human Resources	Corporate Headquarters
Jodi	Chen	jchen@email.com	Compliance Officer	Administration	Corporate Headquarters
Tom	Hansen	thansen@email.com	Accounting Manager	Accounting	Corporate Headquarters
Susan	Howard	susanhoward@policy	Document Control Administrator	Administration	Corporate Headquarters
Douglas	Johnson	dj@email.com	Chief Executive Officer	Administration	Corporate Headquarters
Anne	Jones	ajones@email.com	Chief Finance Officer	Administration	Corporate Headquarters
Teresa	Monson	tmonson@email.com	Chief Operations Officer	Administration	Corporate Headquarters

Close

How to Generate

- 1. Click **Reports**.
- 2. Click **User Reports**, and then click **Dedicated Licenses**.



The report opens immediately in a separate browser window.

Dedicated Licenses						
First Name	Last Name	Email Address	Job Title	Department	Site	
Darren	Breen		HR Director	Human Resources	Corporate Headquarters	
Jodi	Chen	jchen@email.com	Compliance Officer	Administration	Corporate Headquarters	
Tom	Hansen	thansen@email.com	Accounting Manager	Accounting	Corporate Headquarters	
Susan	Howard	susanhoward@policyo	Document Control Administrator	Administration	Corporate Headquarters	
Douglas	Johnson	dj@email.com	Chief Executive Officer	Administration	Corporate Headquarters	
Anne	Jones	ajones@email.com	Chief Finance Officer	Administration	Corporate Headquarters	
Teresa	Monson	tmonson@email.com	Chief Operations Officer	Administration	Corporate Headquarters	

Questionnaire Reports

The **Questionnaire Reports** category includes the following:

- [Questionnaire Results By Document](#)
- [Questionnaire Results By User](#)
- [Questionnaire Statistics](#)

Report: Questionnaire Results by Document

Description

Shows all users' questionnaire results by question for the selected documents or questionnaires.

Available to users with the following roles or permissions:

Document Owner, Report Manager, Administrator

Sample Report:

Layout: Questionnaire View

^ Data

Title

Questionnaire Version

Question

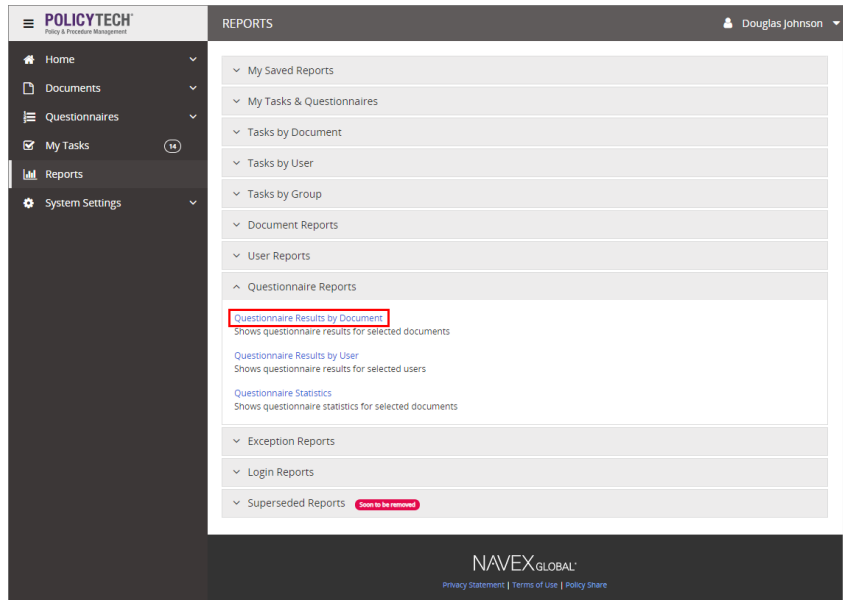
Find...

Response	User	Attempt #
^ Title: Family and Medical Leave (1)	3	
^ Questionnaire Version: 1 (7)	3	
^ Question: 1: How long must an employee...	3	
12 months	Jones, Anne (Chief Fl...	1
12 months	Cash, Jordon (Accou...	1
12 months	Cash, Jordon (Accou...	2
6 months	Woo, Josh (Accounta...	1
v Question: 2: Which of the following is not...	3	
v Question: 3: What is the maximum amou...	3	
v Question: 4: True or false: A victim of a cr...	3	
v Question: 5: If you know in advance that ...	3	
v Question: 6: If your leave was unforeseea...	3	
v Question: 7: True or false: All paperwork ...	3	

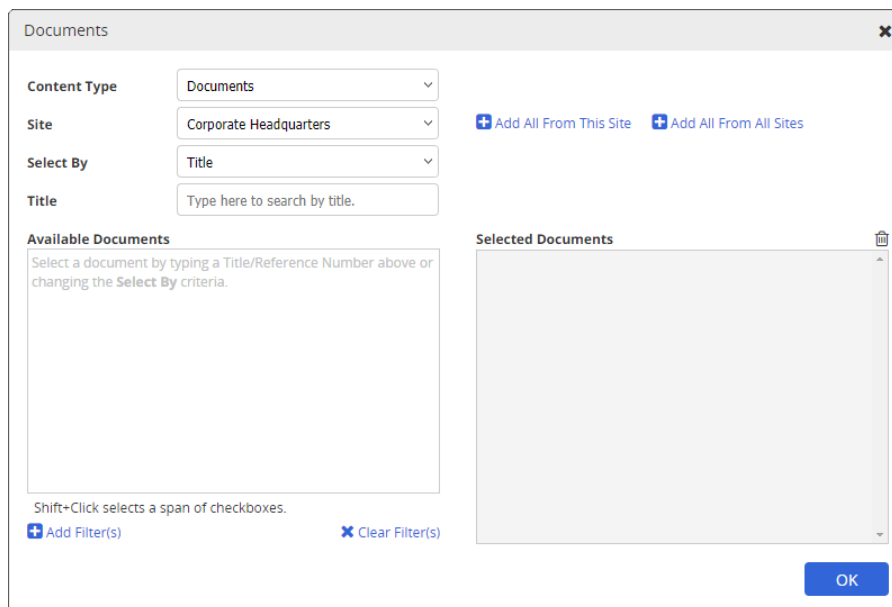
15 30 60 Page 1 of 1 << < > >>

How to Generate

1. Click **Reports**.
2. Click **Questionnaire Reports**, and then click **Questionnaire Results by Document**.



3. Select documents or questionnaires to include in the report (see [Selecting Documents](#) for help), and then click **OK**.

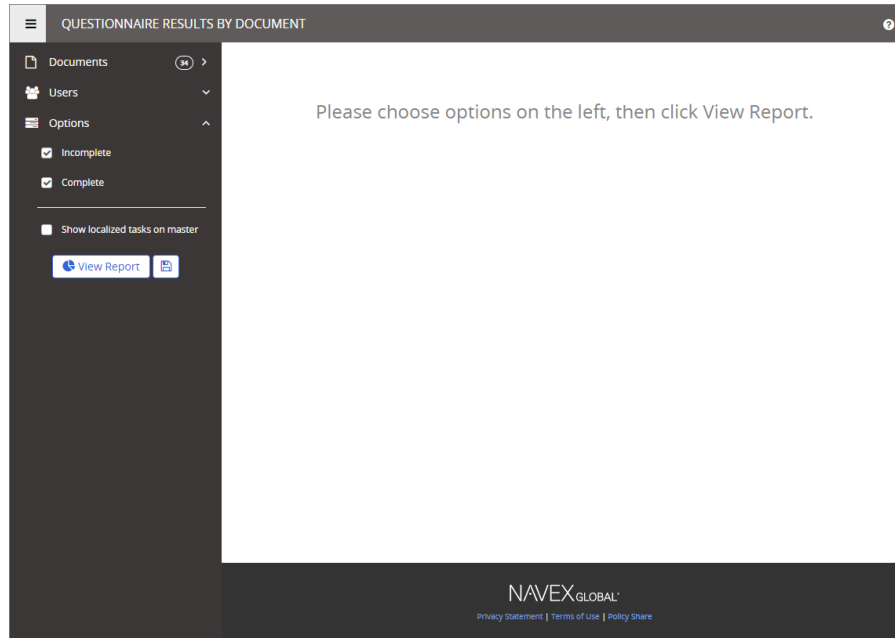


All options available for this report are displayed on the left. Notice that the number of currently selected documents/questionnaires is displayed after

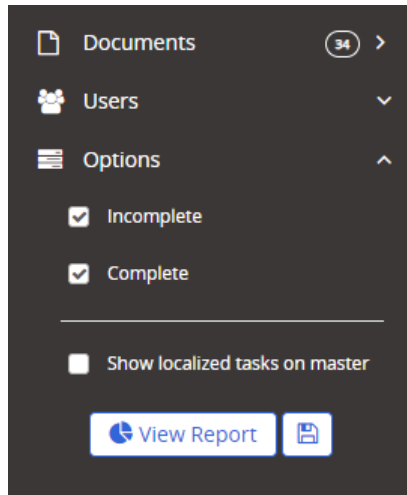
the **Documents** option, which you can click anytime to change your document/questionnaire selection.

Note: If you change your document/questionnaire selection after clicking **View Report**, click **View Report** again to refresh the report contents.

4. (Optional) To limit the selected documents to only those assigned to specific users, click **Users** and make selections in the same way as you would for a user-based report (see [Selecting Users](#) for help).



5. (Optional) Under **Options**, **Incomplete** and **Complete** are selected by default, meaning that information about all users assigned to complete the selected questionnaires will be included in the report results, whether or not those users have already submitted their questionnaire responses. Click to clear the **Incomplete** or **Complete** check box to exclude that information.



If Localization Workflow is enabled, you will also see the **Show localized tasks on master** option. Select this option if you want the questionnaire results from synced localized copies included with the master document's/questionnaire's results.

6. Click **View Report**.
7. For **Layout**, select **Questionnaire View** or **Questionnaire Completion View**.

Questionnaire View organizes report data by document/questionnaire title, then by questionnaire version, and then by question, with individual user status and results for each question.

Layout: Questionnaire View

^ Data

Title

Questionnaire Version

Question

Find...

Response	User	Attempt #
^ Title: Family and Medical Leave (1)		
^ Questionnaire Version: 1 (7)		
^ Question: 1: How long must an employee...		
12 months	Jones, Anne (Chief Fi...	1
12 months	Cash, Jordon (Accou...	1
12 months	Cash, Jordon (Accou...	2
6 months	Woo, Josh (Accounta...	1
v Question: 2: Which of the following is not...		
v Question: 3: What is the maximum amou...		
v Question: 4: True or false: A victim of a cr...		
v Question: 5: If you know in advance that ...		
v Question: 6: If your leave was unforeseea...		
v Question: 7: True or false: All paperwork ...		

153060

Page 1 of 1<<<>>>

Questionnaire Completion View organizes report data by completion status—complete and incomplete—then by document/questionnaire title, then by questionnaire version, then by user, with each user's responses.

Layout: Questionnaire Com... ⌵ ⋮

^ Data ⚙

Completion Status ⌵ ✕ Title ⌵ ✕ Questionnaire Version ⌵ ✕ Find... 🔍

Question	Response	Attempt #
^ Completion Status: Complete (1)	28	
^ Title: Family and Medical Leave (1)	28	
^ Questionnaire Version: 1 (3)	28	
^ User: Cash, Jordan (Accounts Payable Clerk) (14)	14	
1: How long must an employee have been empl...	12 months	1
1: How long must an employee have been empl...	12 months	2
2: Which of the following is not a recognized lea...	Research leave	1
2: Which of the following is not a recognized lea...	Research leave	2
3: What is the maximum amount of time allowe...	18 months	1
3: What is the maximum amount of time allowe...	12 months	2
4: True or false: A victim of a crime can qualify f...	True	1
4: True or false: A victim of a crime can qualify f...	True	2
5: If you know in advance that you will need a le...	Your manager	1
5: If you know in advance that you will need a le...	Both Human Resources and your manager	2
6: If your leave was unforeseeable, you must co...	14 days	1
6: If your leave was unforeseeable, you must co...	14 days	2
7: True or false: All paperwork pertaining to you...	False	1
7: True or false: All paperwork pertaining to you...	False	2
✓ User: Jones, Anne (Chief Finance Officer) (7)	7	
✓ User: Woo, Josh (Accountant) (7)	7	

15 30 60 Page 1 of 1 << < > >>


Note: For details on how to create and work with custom layouts, see the following sections of the [Working with Report Layouts](#) section:

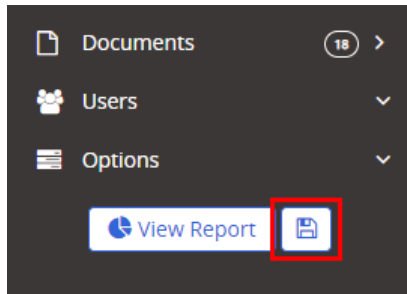
[Creating a Custom Report Layout](#)

[Selecting a Custom or Shared Report Layout](#)

[Modifying or Deleting a Custom Report Layout](#)

[Setting a Default Report Layout](#)

8. Customize the **Data** grid to show only the data you need in the way you want it represented ([Working with the Data Pane](#)).
9. (Optional) To save all of the report's current document/questionnaire and user selections, option settings, and customizations for future use, click , type a name and description, and then click **OK**.



10. (Optional) Print or save the current report results (see [Printing or Saving Report Results](#)).

Report: Questionnaire Results by User

Description

Shows all questionnaire results for the selected users.

Available to users with the following roles or permissions:

Manager, Report Manager, Administrator

Sample Report:

Layout: User View

^ Data

User Title Questionnaire Version Question

Find...

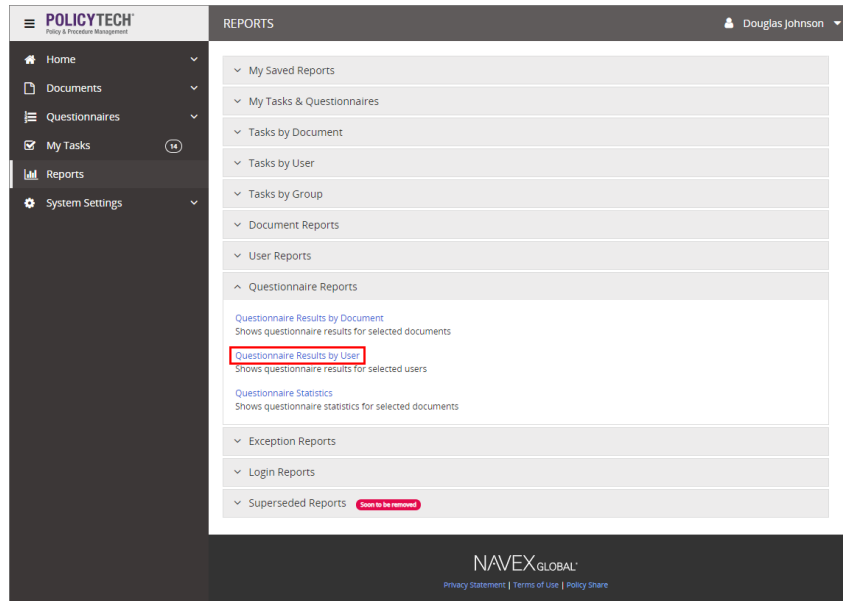
Response	Attempt #
^ User: Hansen, Tom (Accounting ...	
^ Title: Conflict of Interest Surv...	
^ Questionnaire Version: 1 ...	
^ Question: 1: Please lis...	
NAVEX Global	1
^ Question: 2: Are you ...	
No	1
^ Question: 3: Please pr...	
[No Response]	1
^ Question: 4: Other th...	
No	1
v Question: 5: Please su...	
v Question: 6: Within th...	
v Question: 7: Please id...	
v Question: 8: Are you a...	
v Question: 9: Please d...	
v Question: 10: Do you ...	
v Question: 11: Please c...	
v Question: 12: Do you ...	
v Question: 13: Please ...	
v Title: J Family and Medical Le...	

15 30 60

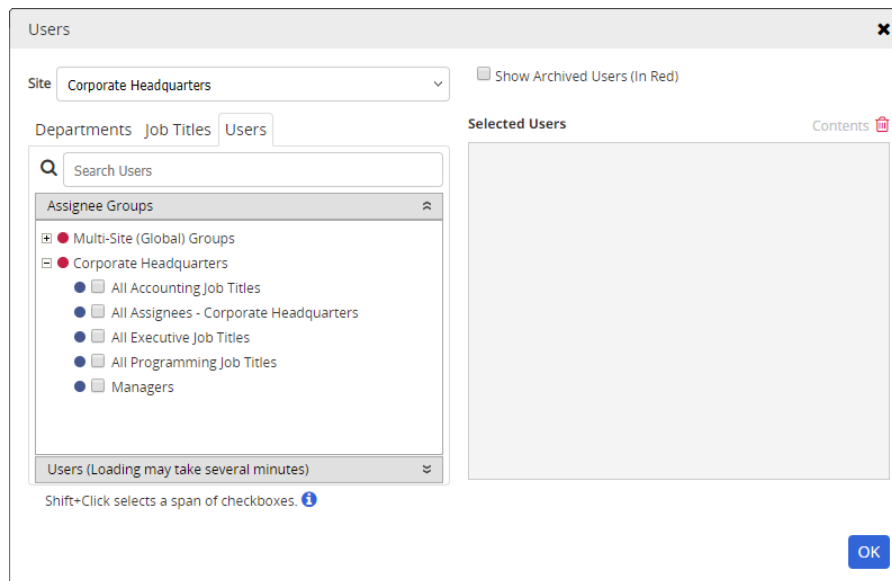
Page 1 of 1

How to Generate

- 1. Click **Reports**.
- 2. Click **Questionnaire Reports**, and then click **Questionnaire Results by User**.

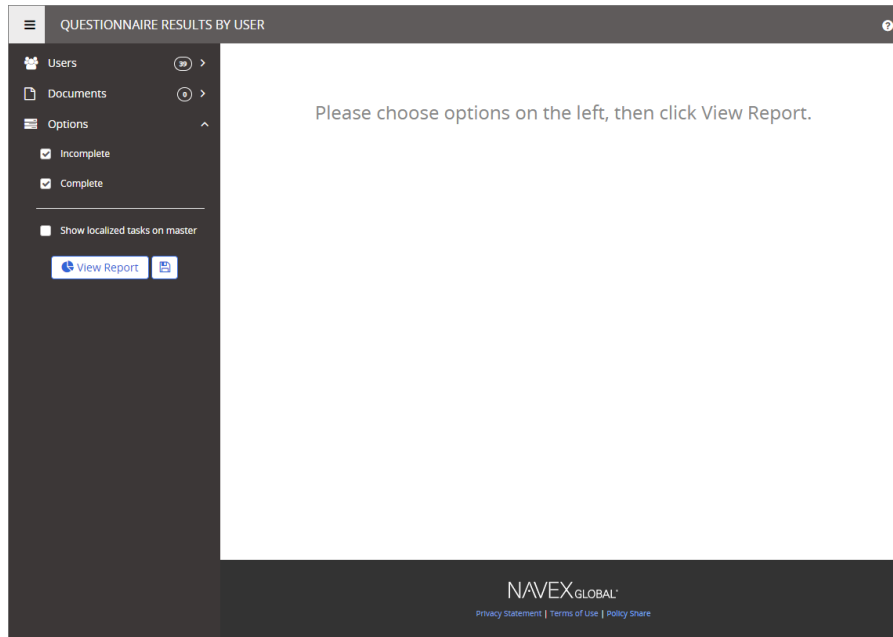


3. Select the users you want included in the report (see [Selecting Users](#) for help).

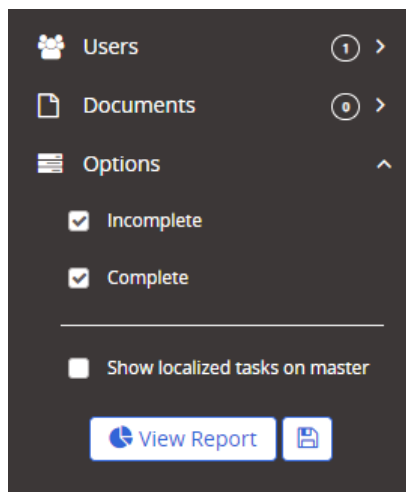


All options available for this report are displayed on the left. Notice that the number of currently selected users is displayed after the **Users** option, which you can click anytime to change your user selection.

Note: If you change your user selection after clicking **View Report**, click **View Report** again to refresh the report contents.



4. (Optional) To limit the selected users to only those assigned to specific documents or questionnaires, click **Documents**, and then select documents/questionnaires in the same way as you would for a document-based report (see [Selecting Documents](#) for help)..
5. (Optional) Under **Options**, **Incomplete** and **Complete** are selected by default, meaning that information about all users assigned to complete the selected questionnaires will be included in the report results, whether or not those users have already submitted their questionnaire responses. Click to clear the **Incomplete** or **Complete** check box to exclude that information.




If Localization Workflow is enabled, you will also see the **Show localized tasks on master** option. Select this option if you want the questionnaire results from synced localized copies included with the master document's/questionnaire's results.


Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.






- 6. Click **View Report**.
- 7. For **Layout**, select **User View** or **User Completion View**.

User View organizes report data by user, then by assigned document/questionnaire, then by questionnaire version, and finally by question, with individual user status and results for each question.

Layout:

User View 



Data 				
User 	Title 	Questionnaire Version 	Question 	Find...
Response	Attempt #			
^ User: Hansen, Tom (Accounting ...)				
^ Title: Conflict of Interest Surv...				
^ Questionnaire Version: 1 ...				
^ Question: 1: Please lis...				
NAVEX Global	1			
^ Question: 2: Are you ...				
No	1			
^ Question: 3: Please pr...				
[No Response]	1			
^ Question: 4: Other th...				
No	1			
v Question: 5: Please su...				
v Question: 6: Within th...				
v Question: 7: Please id...				
v Question: 8: Are you a...				
v Question: 9: Please d...				
v Question: 10: Do you ...				
v Question: 11: Please c...				
v Question: 12: Do you ...				
v Question: 13: Please ...				
v Title: ↓ Family and Medical Le...				
15	30	60	Page 1 of 1 < > >>	

User Completion View organizes report data by completion status—complete and incomplete—then by user, then by document/questionnaire title, and finally by question, with each user's responses.

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 before ...	12 months	1
2: Which of the following is not a recognized leave type for o...	Research leave	1
3: What is the maximum amount of time allowed for family L...	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 mus...	Both Human Resources and your manager	1
6: If your leave was unforeseeable, you must complete a leav...	14 days	1
7: True or false: All paperwork pertaining to your leave is pla...	False	1
^ Completion Status: Incomplete (1)	20	
^ User: Jones, Anne (Chief Finance Officer) (2)	20	
^ Title: Conflict of Interest Survey (1)	13	
^ Questionnaire Version: 1 (13)	13	
^ Title: 1 Family and Medical Leave - East Region (1)	7	

15 30 60 Page 1 of 1 ⏪ ⏩


Note: For details on how to create and work with custom layouts, see the following sections of the [Working with Report Layouts](#) section:

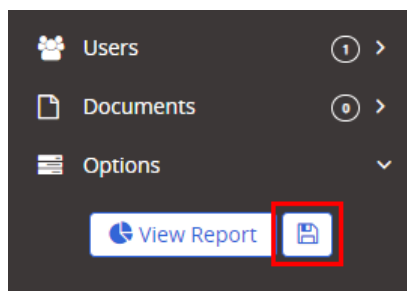
[Creating a Custom Report Layout](#)

[Selecting a Custom or Shared Report Layout](#)

[Modifying or Deleting a Custom Report Layout](#)

[Setting a Default Report Layout](#)

8. Customize the **Data** grid to show only the data you need in the way you want it represented ([Working with the Data Pane](#)).
9. (Optional) To save all of the report's current document/questionnaire and user selections, option settings, and customizations for future use, click , type a name and description, and then click **OK**.



10. (Optional) Print or save the current report results (see [Printing or Saving Report Results](#)).

Report: Questionnaire Statistics

Description

For the selected questionnaires or documents with questionnaires, shows results statistics for each question and answer.

Available to users with the following roles or permissions:

Manager, Report Manager, Administrator

Sample Report:

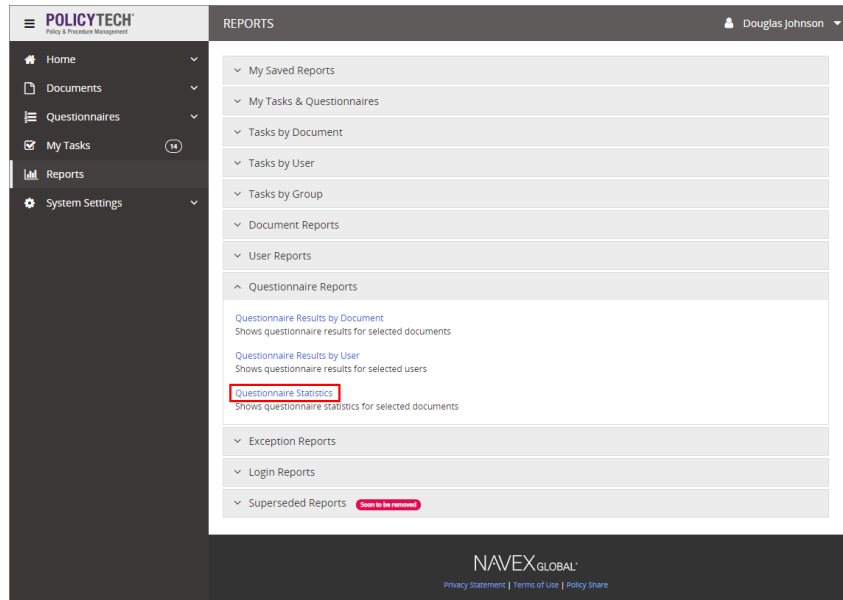
Layout: Quiz View

Data				
Title	Questionnaire Version	Question	Find...	
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 th...				100%
Research leave	4	100%	Correct	100%
Medical leave	0	0%	Incorrect	100%
Family leave	0	0%	Incorrect	100%
^ Question: 3: What is the...				75%
6 months	0	0%	Incorrect	75%
9 months	0	0%	Incorrect	75%
12 months	3	75%	Correct	75%
18 months	1	25%	Incorrect	75%
v Question: 4: True or fals...				100%
v Question: 5: If you know...				75%
v Question: 6: If your leav...				75%
v Question: 7: True or fals...				100%

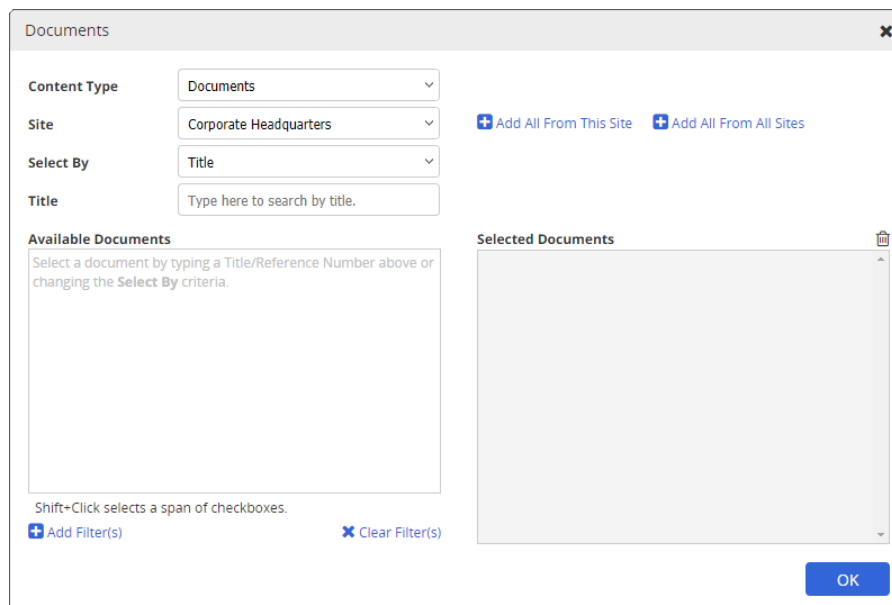
15 30 60 Page 1 of 1 < > >>

How to Generate

1. Click **Reports**.
2. Click **Questionnaire Reports**, and then click **Questionnaire Results by User**.



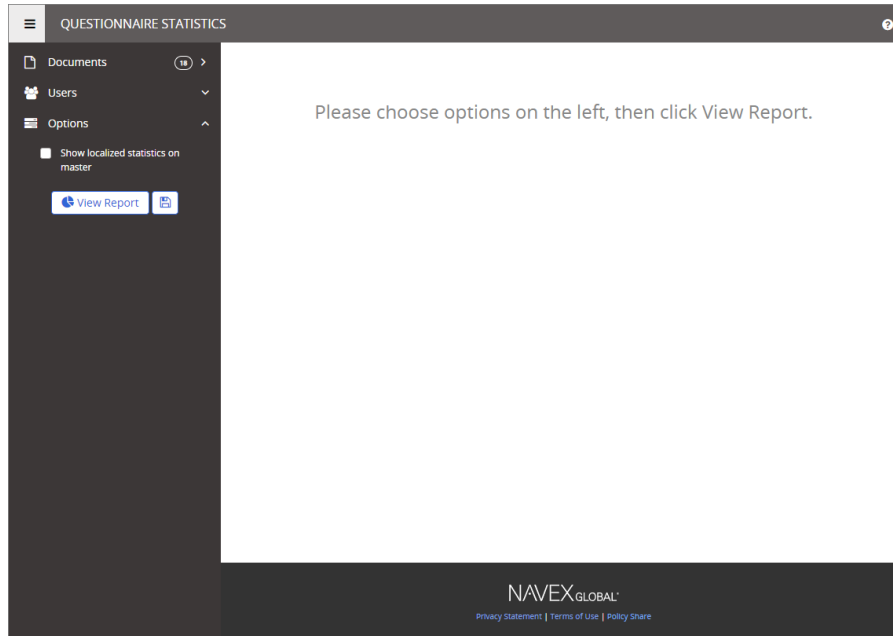
3. Select documents or questionnaires to include in the report (see [Selecting Documents](#) for help), and then click **OK**.



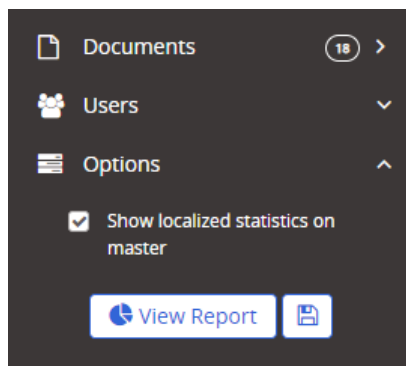
All options available for this report are displayed on the left. Notice that the number of currently selected documents/questionnaires is displayed after

the **Documents** option, which you can click anytime to change your document/questionnaire selection.

Note: If you change your document/questionnaire selection after clicking **View Report**, click **View Report** again to refresh the report contents.



4. (Optional) To limit the selected documents to only those assigned to specific users, click **Users** and make selections in the same way as you would for a user-based report (see [Selecting Users](#) for help).
5. (Conditional) If Localization Workflow is enabled, under **Options**, select **Show localized statistics on master** if you want the questionnaire statistics from synced localized copies included with the master document's/questionnaire's statistics.






Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.






6. Click **View Report**.

Note: You can also click **View Report** at any time while setting report options. After changing an option, remember to click **View Report** again to refresh the report contents.

7. For **Layout**, select **Quiz View** or **Survey View**.

Quiz View includes the **Answer Key** column to show which are the correct answers, and the **% Correct Answers** column.

Layout: Quiz View   

Data 				
Title 	Questionnaire Version 		Question 	Find... 
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 th...				100%
Research leave	4	100%	Correct	100%
Medical leave	0	0%	Incorrect	100%
Family leave	0	0%	Incorrect	100%
^ Question: 3: What is the...				75%
6 months	0	0%	Incorrect	75%
9 months	0	0%	Incorrect	75%
12 months	3	75%	Correct	75%
18 months	1	25%	Incorrect	75%
v Question: 4: True or fals...				100%
v Question: 5: If you know...				75%
v Question: 6: If your leav...				75%
v Question: 7: True or fals...				100%

15 30 60 Page 1 of 1 << < > >>

Survey View includes the **Questionnaire Submissions** column to show how many times each questionnaire has been completed.

Layout: Survey View ⌵ ⋮

^ Data ⚙

Title Questionnaire Version Question Find... 🔍

Answer	Times Chosen	Percent Chosen	Questionnaire Submissions
^ Title: Conflict of Interest Survey (1)			3
^ Questionnaire Version: 1 (13)			3
^ Question: 1: Please list your employer(s) ...			3
(Open-Ended)	3	100%	3
^ Question: 2: Are you or have you been, w...			3
Yes	1	33%	3
No	2	67%	3
^ Question: 3: Please provide the names of...			3
(Open-Ended)	1	100%	3
^ Question: 4: Other than incidental owner...			3
Yes	1	33%	3
No	2	67%	3
✓ Question: 5: Please supply the following I...			3
✓ Question: 6: Within the past twelve (12) ...			3
✓ Question: 7: Please identify all such gifts,...			3
✓ Question: 8: Are you aware of any past o...			3
✓ Question: 9: Please describe the activity: ...			3
✓ Question: 10: Do you have a currently eff...			3
✓ Question: 11: Please copy and paste the ...			3
✓ Question: 12: Do you or your employer h...			3
✓ Question: 13: Please describe the inventi...			3

15 30 60 Page 1 of 1 << < > >>


Note: For details on how to create and work with custom layouts, see the following sections of the [Working with Report Layouts](#) section:

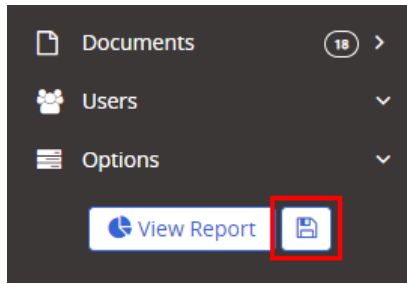
[Creating a Custom Report Layout](#)

[Selecting a Custom or Shared Report Layout](#)

[Modifying or Deleting a Custom Report Layout](#)

[Setting a Default Report Layout](#)

- Customize the **Data** grid to show only the data you need in the way you want it represented ([Working with the Data Pane](#)).
- (Optional) To save all of the report's current document/questionnaire and user selections, option settings, and customizations for future use, click , type a name and description, and then click **OK**.



10. (Optional) Print or save the current report results (see [Printing or Saving Report Results](#)).

Exception Reports

The **Exception Reports** category includes the following report.

Report: Exceptions by Document

Description

Shows all users who chose questionnaire answers designated as exceptions.

Available to users with the following roles or permissions:

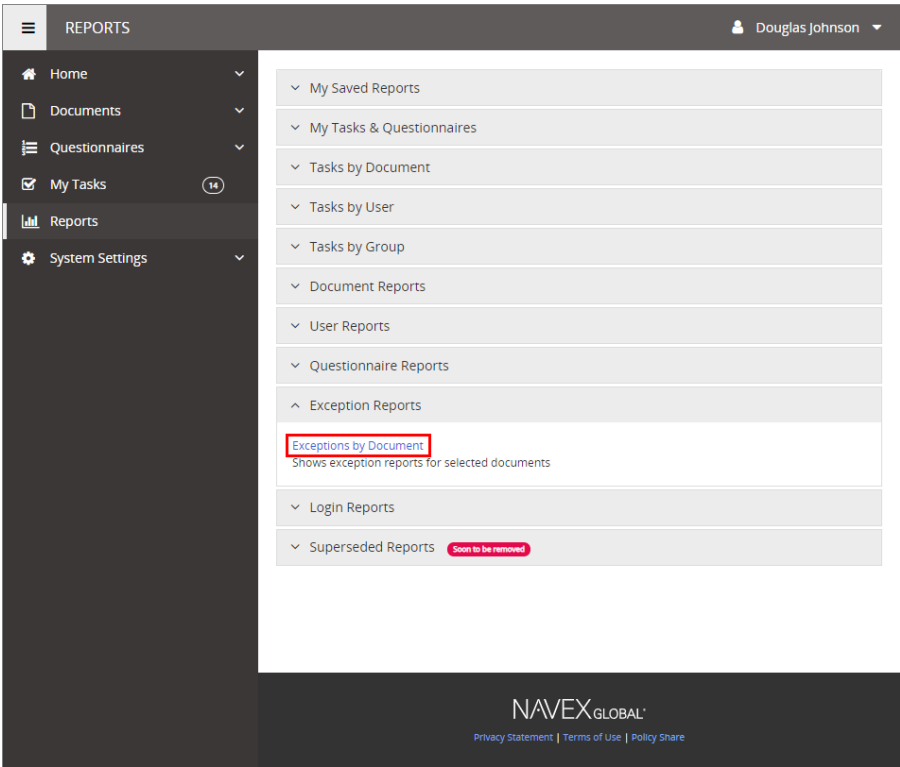
Report Manager, Administrator

Sample Report:

Last Name	Ref. #	Title (Version)	Version Number	Quiz Version	Date/Time Taken	Attempt #	Question	Answer
Hansen	281	Gift Policy	1	1	08/19/2013 10:23 AM	1	I have accepted a g	True

How to Generate

1. Click **Reports**.
2. Click **Exception Reports**, and then click **Exceptions by Document**.



3. Select documents or questionnaires to include in the report (see [Selecting Documents](#) for help), and then click **OK**.

Documents

Content Type

Documents

Status

All Statuses

Site

Corporate Headquarters

+ Add All From This Site + Add All From All Sites

Select By

Title

Title

Type here to search by title.

Available Documents

Select a document by typing a Title/Reference Number above or changing the Select By criteria.

Selected Documents

Shift+Click selects a span of checkboxes.

+ Add Filter(s) X Clear Filter(s)

OK

All options available for this report are displayed on the left. Notice that the number of currently selected documents/questionnaires is displayed after the **Documents** option, which you can click anytime to change your document/questionnaire selection.

Note: If you change your document/questionnaire selection after clicking **View Report**, click **View Report** again to refresh the report contents.

EXCEPTIONS BY DOCUMENT

Documents

211

Arrangement

Date

Last 30 Days

View Report

Please close this window after Excel export is saved.

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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 the **Reference #** check box.


The screenshot shows the 'Arrangement' window with a table of documents. A red box highlights the 'Show/Hide Columns' dialog box, which has two checked items: 'Reference #' and 'Title'.

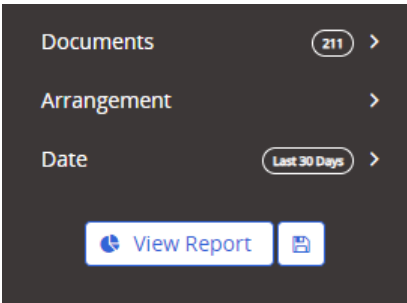
Reference #	Title
52	Account Collection Process (v.1)
320	Account Collection Process (v.1)
320	Account Collection Process (v.2)
1	Account Collections Form (v.1)
2	Accounts Payable and Cash Distribution (v.1)
67	Americans with Disabilities Act (v.1)
86	Assembly Manuals (v.1)
3	Bad NSF Checks (v.1)
4	Bank Account Reconciliation (v.1)
53	Bank Loan Applications (v.1)

Page 1 of 22 Records 1 - 10

- By default, the user sort order in the report is ascending by last name. To change what the users are sorted by, click a different column heading. Click the same column heading again to reverse the sort order.
5. (Optional) By default, this report checks the selected documents/questionnaires regardless of their approval dates. To limit results to a date range, click **Date**, and then select a range. If you click **Custom Range**, also type or select **From** and **To** dates. Click **OK**.

The screenshot shows the 'Date Range' dialog box. The 'Date Range' dropdown menu is open, showing options: All Dates, Last 30 Days, Last 60 Days, Last 90 Days (highlighted), Last Month, Last Quarter, Last 6 Months, Last 12 Months, Previous Year, and Custom Range. An 'OK' button is visible.

6. (Optional) To save the current document/questionnaire selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

7. Click **View Report**. A separate browser window opens along with a Windows system prompt. After opening or saving the file, close the browser window.

Last Name	Ref. #	Title (Version)	Version Number	Quiz Version	Date/Time Taken	Attempt #	Question	Answer	
Hansen	281	Gift Policy	1	1	08/19/2013 10:23 AM	1	I have accepted a g	True	

Login Reports

Go to a section listed below for a description of and instructions on how to generate a login report.

[Failed Logins Due to Insufficient Licenses](#)

[Users Currently Logged In](#)

Report: Failed Logins Due to Insufficient Licenses


Description

Shows each failed login attempt within the specified date range.

Available to users with the following roles or permissions:

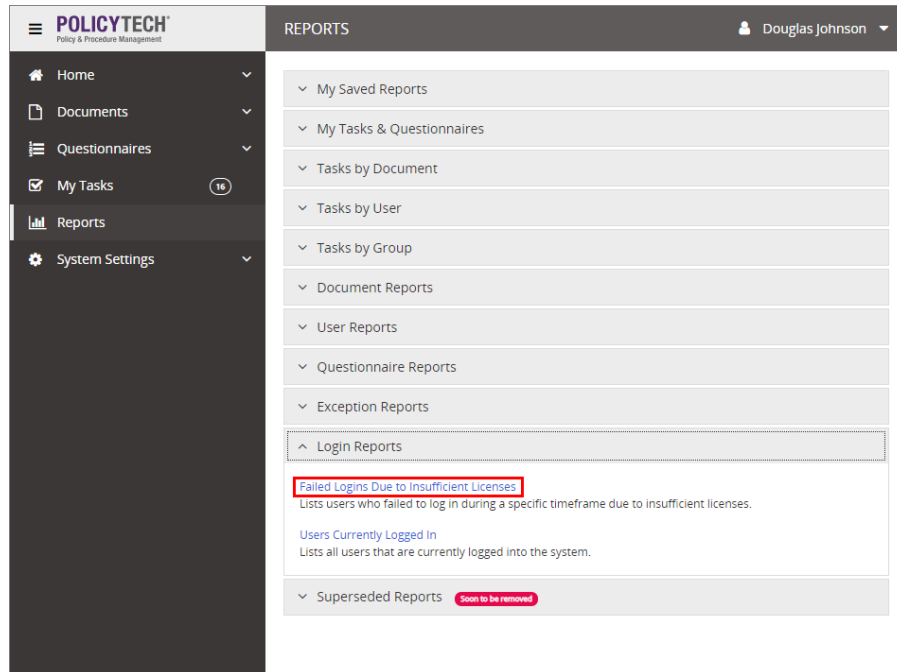
Administrator, System/IT

Sample Report:

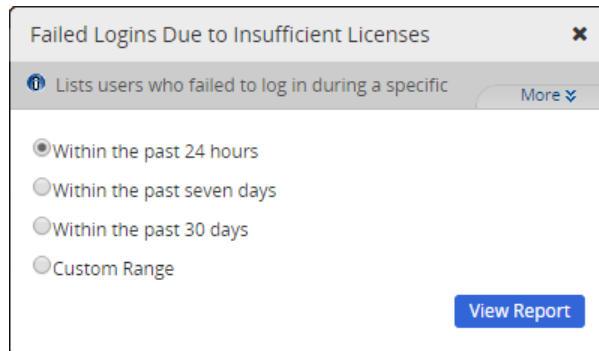
Failed Logins Due to Insufficient Licenses		
NAVEX Global	Date Range: (04/17/2013 - 04/18/2013)	powered by  policytech
Pages: 1	Generated By: Susan Howard	Generated: 04/18/2013 9:19 AM
Login Failures by Site and Department		
Corporate Headquarters (1)		
Fiscal Services (1)		
	Date/Time	User (Job Title)
1.	04/18/2013 9:19 AM	Driggs, Shiela (Director of Finance)

How to Generate

1. Click **Reports**.
2. Click **Login Reports**, and then click **Failed Logins Due to Insufficient Licenses**.

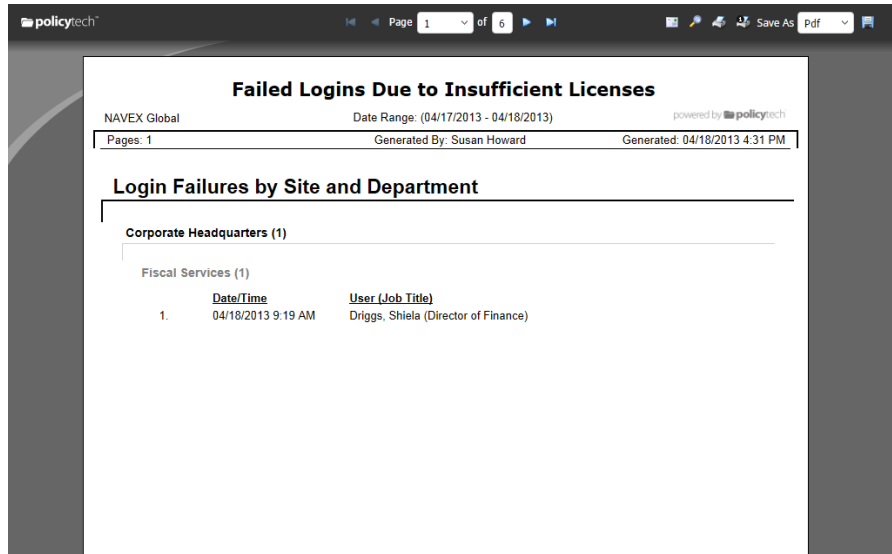


3. Select a preset date range or create a custom one.



4. Click **View Report**.

The report opens in a separate browser window.



policytech

Page 1 of 6

NAVEX Global Date Range: (04/17/2013 - 04/18/2013) powered by policytech

Pages: 1 Generated By: Susan Howard Generated: 04/18/2013 4:31 PM

Login Failures by Site and Department

Corporate Headquarters (1)

Fiscal Services (1)

	<u>Date/Time</u>	<u>User (Job Title)</u>
1.	04/18/2013 9:19 AM	Driggs, Shiela (Director of Finance)

Report: Users Currently Logged In

Description

Shows which users are currently logged in to PolicyTech.

Available to users with the following roles or permissions:

Administrator, System/IT

Sample Report:

Users Currently Logged In

NAVEX Global
powered by policytech

Pages: 1
Generated By: Susan Howard
Generated: 04/18/2013 9:26 AM

Summary

Users Logged In	
Anonymous Users Currently Viewing Site	0
Public Users Currently Viewing Site	0
Users Currently Logged In	3

Users Logged in by Department

1. Corporate Headquarters: Administration

Users Currently Logged In (3)

	Users	Last Login	Recent Activity
1.	Howard, Susan (Document, Control Administrator)	04/18/2013 9:17 AM	04/18/2013 9:26 AM
2.	Hansen, Tom (Accounting Manager)	04/18/2013 9:25 AM	04/18/2013 9:25 AM
3.	Woo, Josh (Accountant)	04/18/2013 9:26 AM	04/18/2013 9:26 AM

How to Generate

1. Click **Reports**.
2. Click **Login Reports**, and then click **Users Currently Logged In**.

POLICYTECH
Policy & Procedure Management

- [Home](#)
- [Documents](#)
- [Questionnaires](#)
- [My Tasks](#) 10
- [Reports](#)
- [System Settings](#)

REPORTS
Douglas Johnson ▾

My Saved Reports

My Tasks & Questionnaires

Tasks by Document

Tasks by User

Tasks by Group

Document Reports

User Reports

Questionnaire Reports

Exception Reports

^ Login Reports
▾

Failed Logins Due to Insufficient Licenses

Lists users who failed to log in during a specific timeframe due to insufficient licenses.

Users Currently Logged In

Lists all users that are currently logged into the system.

Superseded Reports Soon to be removed

The report opens immediately in a separate browser window.

policytech

Page 1 of 1

Save As Pdf

NAVEX Global

powered by policytech

Pages: 1

Generated By: Douglas Johnson

Generated: 10/03/2016 08:16

Summary

Users Logged In	
Anonymous Users Currently Viewing Site	0
Public Users Currently Viewing Site	0
Users Currently Logged In	1

Users Logged in by Department

1. Corporate Headquarters: Administration

Users Currently Logged In (1)

	Users	Last Login	Recent Activity
1.	Johnson, Douglas (Chief Executive Officer)	10/03/2016 06:23	10/03/2016 08:16

Superseded Reports

The following reports have been superseded by their next-generation counterparts.

[Writer Tasks \(Tasks by User\)](#)

[Reviewer Tasks \(Tasks by User\)](#)

[Approver Tasks \(Tasks by User\)](#)

[Reader Tasks \(Tasks by User\)](#)

[Document Owner - Resubmit for Review Tasks \(Tasks by User\)](#)

[All Workflow Tasks \(Tasks by User\)](#)

[In Draft \(Tasks by Document\)](#)

[In Collaboration \(Tasks by Document\)](#)

[In Review \(Tasks by Document\)](#)

[In Approval \(Tasks by Document\)](#)

[In Published \(Tasks by Document\)](#)

[All Workflow Statuses \(Tasks by Document\)](#)

[Writer Tasks \(My Tasks & Questionnaires\)](#)

[Reviewer Tasks \(My Tasks & Questionnaires\)](#)

[Approver Tasks \(My Tasks & Questionnaires\)](#)

[Reader Tasks \(My Tasks & Questionnaires\)](#)

[All Workflow Tasks \(My Tasks & Questionnaires\)](#)

[Questionnaire Results by Document \(Questionnaire Reports\)](#)

[Questionnaire Results by User \(Questionnaire Reports\)](#)

Report: Tasks by User - Writer Tasks

Important: This report has been superseded by the [Tasks by User - Current](#) and [Tasks by User - All Tasks](#) reports. Because this report will be removed from PolicyTech in a future release, we strongly recommend using the next-generation reports instead. See [Transitioning to Next-Generation Reports](#) for help.

Description


Provides details about the selected users' assigned writing tasks. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:

Manager, Report Manager, Administrator

Sample Report:

Writer Tasks - Incomplete

NAVEX Global All Dates powered by  policytech[®]

Pages: 1 Generated By: Douglas Johnson Generated: 11/07/2014 09:08

Summary

Writers	Incomplete	Over 30 Days
1	2	0

Users with Tasks

1. Gifford, Tawna (Accounts Receivable Clerk)	Site: Corporate Headquarters	Department: Accounting
	<u>Incomplete</u>	<u>Over 30 Days</u>
	2	0

Incomplete Tasks (2)

	Action	Ref. #	Title (Version)	Start Date	Days Assigned
1.	Waiting	7	Cash Receipts (v.1)	06/30/2014	29
2.	Waiting	12	Invoice Billings (v.1)	06/30/2014	29

†Task completed with Enhanced Validation
*Task completed by Proxy

1/1

How to Generate

1. Click **Reports**.
2. Click **Superseded Reports**, and then click **Writer Tasks (Tasks by User)**.
3. Select the users you want included in the report (see [Selecting Users](#) for help).

Users

Site: Corporate Headquarters

Show Archived Users (In Red)

Departments Job Titles Writers

Search Writers

Writer Groups

Writers

- ☐ Addison, Victoria (Accountant)
- ☐ Allison, Todd (Tester)
- ☐ Breen, Darren (Personnel Manager)
- ☐ Cane, Taylor (Tester)
- ☐ Christenson, Robert (Administrator)
- ☐ Driggs, Shiela (Director of Finance)
- ☐ Ellis, Darcy (Installer)
- ☐ Farnsworth, John (Manager)
- ☐ Gatos, Will (Chief Information Officer)
- ☐ Gleeson, Edward (Manager)
- ☐ Hansen, Tom (Accounting Manager)
- ☐ Johnson, Douglas (Chief Executive Officer)

Selected Users

Contents

Shift+Click selects a span of checkboxes.

OK

All options available for this report are displayed on the left. Notice that the number of currently selected users is displayed after the **Users** option, which you can click anytime to change your user selection.

Note: If you change your user selection after clicking **View Report**, click **View Report** again to refresh the report contents.

TASKS BY USER - WRITER TASKS

Users 20

Documents 8

Arrangement

Detail Options

Task Options

Output Format

View Report

Please choose options on the left, then click View Report.

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- (Optional) To limit the selected users to only those assigned to specific documents or questionnaires, click **Documents**, and then select documents/questionnaires in the same way as you would for a document-based report (see [Selecting Documents](#) for help)..
- (Optional) Click **Arrangement** and do any of the following:

- To change the default report columns, click **Show/Hide Columns**, and then select or click to clear check boxes.

Note: The **Duration** column shows how many days an incomplete task has been assigned or how many days it took to complete a task.

The screenshot shows a window titled 'Arrangement' with a close button (X) in the top right corner. Below the title bar, it says 'Writers Found: 20'. The main content is a table with four columns: 'Last Name', 'First Name', 'Job Title', and 'Site'. The table lists 10 writers, all from 'Corporate Headquarters'. A dropdown menu labeled 'Show/Hide Columns' is open, showing a list of columns with checkboxes: 'Last Name' (checked), 'First Name' (checked), 'Job Title' (checked), 'Site' (checked), 'Department' (checked), 'Duration' (unchecked), and 'Document Owner' (unchecked). The table has a footer showing 'Page 1 of 2' and 'Records 1 - 10'. An 'OK' button is in the bottom right corner.

Last Name	First Name	Job Title	Site
Addison	Victoria	Accountant	Corporate Headquarters
Allison	Todd	Tester	Corporate Headquarters
Breen	Darren	Personnel Manager	Corporate Headquarters
Cane	Taylor	Tester	Corporate Headquarters
Christenson	Robert	Administrator	Corporate Headquarters
Driggs	Shiela	Director of Finance	Corporate Headquarters
Ellis	Darcy	Installer	Corporate Headquarters
Farnsworth	John	Manager	Corporate Headquarters
Gatos	Will	Chief Information Officer	Corporate Headquarters
Gleeson	Edward	Manager	Corporate Headquarters

- By default, the user sort order in the report is ascending by last name. To change what the users are sorted by, click a different column heading. Click the same column heading again to reverse the sort order.

6. (Optional) Click **Detail Options**, and then select any of the following:

Users

20

Documents

0

Arrangement

Detail Options

☒ Include Document Details

☐ Include Graphs

☐ Include Due Dates

Task Options

Output Format

View Report

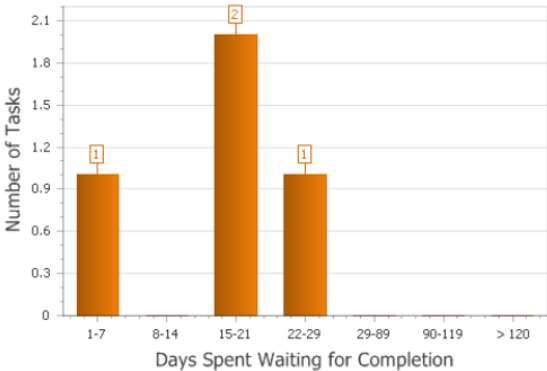
- **Include Document Details:** Shows the tasks associated with each user in the report.

4. Breen, Darren (Personnel Manager)		Site: Corporate Headquarters	Department: Fiscal Services	
			Incomplete	Over 30 Days
			4	0
Incomplete Tasks (4)				
Action	Ref. #	Title (Version)	Start Date	Days Assigned
1. Waiting	12	Invoice Billings (v.1)	03/15/2013	23
2. Waiting	18	Performance Evaluation - Accounting Manager (v.1)	03/20/2013	18
3. Waiting	19	Performance Evaluation - Accounts Payable Clerk (v.1)	03/20/2013	18
4. Waiting	29	Corrective-Preventive Action Form (v.1)	04/03/2013	5

- **Include Graphs:** Adds a graph to the report's **Summary** area. The graph shows the number of days the selected users' tasks have been waiting for completion.

Summary

Writers	Incomplete	Over 30 Days
1	4	0



- **Include Due Dates:** Adds a **Due Date** column to the task details.

Important: This option applies only if the **Include Document Details** option is selected.

Incomplete Tasks (2)

Action	Ref. #	Title (Version)	Start Date	Days Assigned	Due Date
1. Waiting	7	Cash Receipts (v.1)	06/30/2014	29	08/05/2014
2. Waiting	12	Invoice Billings (v.1)	06/30/2014	29	08/05/2014

7. (Optional) Click **Task Options**, and then do any of the following:
- Click a single task status (overdue, incomplete, incomplete with upcoming levels, or complete) or click **Incomplete & Complete Tasks**.

Users

12

>

Documents

0

>

Arrangement>

Detail Options▼

Task Options▲

☒ Only Overdue Tasks

☐ Only Incomplete Tasks

☐ Incomplete Tasks with Upcoming Levels

☐ Only Complete Tasks

☐ Incomplete & Complete Tasks

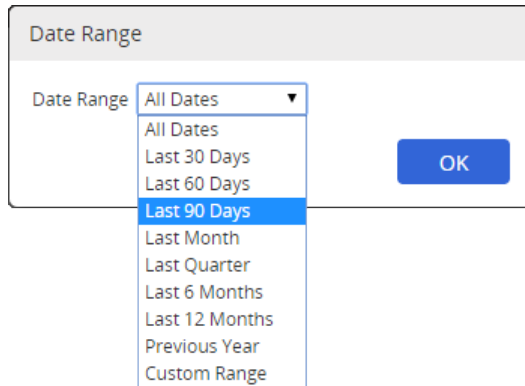
Output Format▼

View Report

If you select **Incomplete Tasks with Upcoming Levels**, information will be shown about any tasks that assigned reviewers have not yet received notification for. These could be tasks for documents or questionnaires that have not yet reached the reviewer status or tasks for documents/questionnaires currently in review but that have not yet reached a reviewer's assigned level.

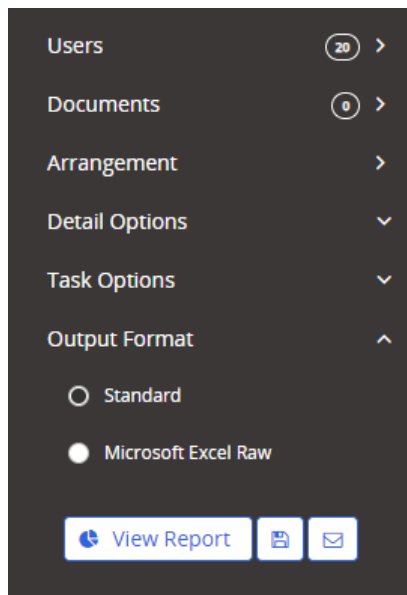
Upcoming Tasks (20)				
Action	Ref. #	Title (Version)	Start Date	Days Assigned
5. Upcoming Task	32	Cash Receipts (v.1)	N/A	N/A
6. Upcoming Task	13	Code Red Procedures (v.1)	N/A	N/A
7. Upcoming Task	31	Draft Document Moved to Approval (v.1)	N/A	N/A

- If you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, the **Date** option appears. To show only the selected tasks that fall within a certain date range, click **Date**, select a date range, and then click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.




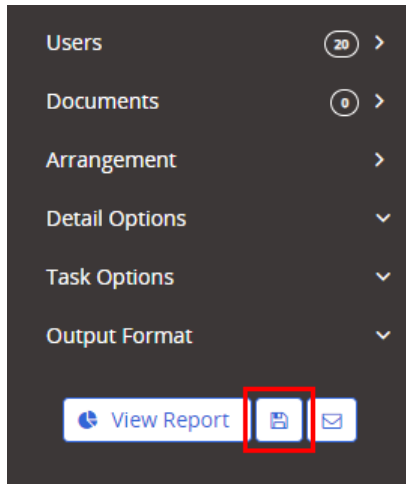
A dialog box titled "Date Range" with a dropdown menu and an "OK" button. The dropdown menu is open, showing the following options: All Dates, Last 30 Days, Last 60 Days, Last 90 Days (highlighted), Last Month, Last Quarter, Last 6 Months, Last 12 Months, Previous Year, and Custom Range.

8. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.




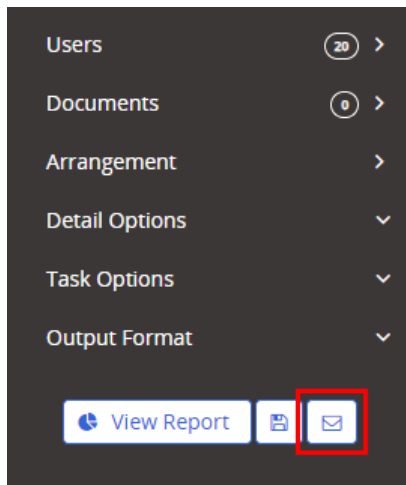
A dark-themed dialog box with a list of settings on the left and a "View Report" button at the bottom. The settings are: Users (20), Documents (0), Arrangement, Detail Options, Task Options, and Output Format (expanded). Under "Output Format", there are two radio buttons: "Standard" (selected) and "Microsoft Excel Raw". At the bottom, there is a "View Report" button and two smaller icons (a folder and an envelope).

9. (Optional) To save the current user selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

10. (Optional and conditional) Depending on your assigned permissions and email setup, after saving this report you may be able to schedule the summary portion of this report to be automatically generated and emailed to you by clicking  (see [Emailing a Report from a Saved Setup](#) for help).



11. 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.

TASKS BY USER - WRITER TASKS

Users

Documents

Arrangement

Detail Options

Task Options

Output Format

View Report

Page 1 of 1

Save As

PDF

Writer Tasks - Incomplete

NAVEX Global

All Dates

powered by policytech

Pages: 1

Generated By: Johnson, Douglas

Generated: 10/31/2018 2:28 PM

Summary

Writers	Incomplete	Incomplete Tasks Over 30 Days
2	2	1

Users with Tasks

1.	Breen, Darren (Personnel Manager)	Site: Corporate Headquarters	Department: Human Resources
----	-----------------------------------	------------------------------	-----------------------------

Incomplete

Incomplete Tasks Over 30 Days

1

0

Incomplete Tasks (1)

Action	Ref. #	Title (Version)	Start Date
1.	Waiting	345	Family and Medical Leave (v.1)
			10/29/2018

2.	Smith, Leroy (Creditor)	Site: Corporate Headquarters	Department: Fiscal Services
----	-------------------------	------------------------------	-----------------------------

Incomplete

Incomplete Tasks Over 30 Days

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	First Name	Last Name	Job Title	Unique E-Mail	Site	Depart	Incomplete	Total Tasks	Over 30 Days	Action	Date/Time	Ref. #	Title (Version)	Versic	Start Date	Days	Task Type	Task		
2	Will	Gatos	Chief Inform	38	wgatos@myc	Corpor	Admin	1	1	1	Waiting	N/A	118 Performance Evaluation	1	11/22/2011	946	Approve	No		
3	Douglas	Johnson	Chief Execu	2	djohnson@my	Corpor	Admin	1	1	1	Waiting	N/A	139 Training and Tuition Rel	1	11/21/2011	947	Approve	No		
4	Lynn	Leonard	Director of E	6	lleonard@my	Corpor	Educa	4	4	4	Waiting	N/A	173 Physical Inventory Proc	1	11/22/2011	946	Approve	No		
5	Lynn	Leonard	Director of E	6	lleonard@my	Corpor	Educa	4	4	4	Waiting	N/A	177 Shipping and Freight Cl	1	11/22/2011	946	Approve	No		
6	Lynn	Leonard	Director of E	6	lleonard@my	Corpor	Educa	4	4	4	Waiting	N/A	176 Receiving, Inspection ai	1	11/22/2011	946	Approve	No		
7	Lynn	Leonard	Director of E	6	lleonard@my	Corpor	Educa	4	4	4	Waiting	N/A	62 Disaster Management F	1	11/22/2011	946	Approve	No		
8	Tony	Potts	Document C	0	tpotts@policy	Corpor	Admin	2	2	2	Waiting	N/A	151 Job Description - Direct	1	11/22/2011	946	Approve	No		

Report: Tasks by User - Reviewer Tasks

Important: This report has been superseded by the [Tasks by User - Current](#) and [Tasks by User - All Tasks](#) reports. Because this report will be removed from PolicyTech in a future release, we strongly recommend using the next-generation reports instead. See [Transitioning to Next-Generation Reports](#) for help.

Description

Provides details about the selected users' assigned reviewing tasks. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:


Manager, Report Manager, Administrator

Sample Report:

Reviewer Tasks - Incomplete

NAVEX Global

All Dates

powered by 

Pages: 1

Generated By: Douglas Johnson

Generated: 11/07/2014 08:41

Summary

Reviewers	Incomplete	Over 30 Days
2	5	1

Users with Tasks

1. Hansen, Tom (Accounting Manager)	Site: Corporate Headquarters	Department: Accounting
	<u>Incomplete</u>	<u>Over 30 Days</u>
	4	0

Incomplete Tasks (4)

Action	Ref. #	Title (Version)	Start Date	Days Assigned
1. Waiting	23	Year End Closing (v.1)	10/30/2014	8
2. Waiting	22	Unsigned or Partial Pay (v.1)	10/30/2014	8
3. Waiting	21	Petty Cash (v.1)	10/30/2014	8
4. Waiting	8	Chart of Accounts (v.1)	10/30/2014	8

2. Howard, Susan (Document, Control Administrator)	Site: Corporate Headquarters	Department: Administration
	<u>Incomplete</u>	<u>Over 30 Days</u>
	1	1

Incomplete Tasks (1)

Action	Ref. #	Title (Version)	Start Date	Days Assigned
1. Waiting	222	Evacuation Procedures (v.1)	09/30/2011	38

‡Task completed with Enhanced Validation

*Task completed by Proxy

1/1

How to Generate

1. Click **Reports**.
2. Click **Superseded Reports**, and then click **ReviewerTasks (Tasks by User)**.
3. Select the users you want included in the report (see [Selecting Users](#) for help).

All options available for this report are displayed on the left. Notice that the number of currently selected users is displayed after the **Users** option, which you can click anytime to change your user selection.

Note: If you change your user selection after clicking **View Report**, click **View Report** again to refresh the report contents.

4. (Optional) To limit the selected users to only those assigned to specific documents or questionnaires, click **Documents**, and then select documents/questionnaires in the same way as you would for a document-based report (see [Selecting Documents](#) for help)..
5. (Optional) Click **Arrangement** and do any of the following:

- To change the default report columns, click **Show/Hide Columns**, and then select or click to clear check boxes.

Note: The **Duration** column shows how many days an incomplete task has been assigned or how many days it took to complete a task.

Arrangement

Reviewers Found: 12

Last Name	First Name	Job Title	Site
Allison	Todd	Tester	Corporate Headquarters
Benton	Carol	Manager	Corporate Headquarters
Breen	Darren	Personnel Manager	Corporate Headquarters
Cane	Taylor	Tester	Corporate Headquarters
Christenson	Robert	Administrator	Corporate Headquarters
Driggs	Shiela	Director of Finance	Corporate Headquarters
Ellis	Darcy	Installer	Corporate Headquarters
Farnsworth	John	Manager	Corporate Headquarters
Gleeson	Edward	Manager	Corporate Headquarters
Hansen	Tom	Accounting Manager	Corporate Headquarters

Show/Hide Columns

☒ Last Name

☒ First Name

☒ Job Title

☒ Site

☒ Department

☐ Duration

☐ Document Owner

Quality Assurance

Technical Services

Fiscal Services

Installations

Systems Administration

Manufacturing

Accounting

Page 1 of 2Records 1 - 10

OK

- By default, the user sort order in the report is ascending by last name. To change what the users are sorted by, click a different column heading. Click the same column heading again to reverse the sort order.

6. (Optional) Click **Detail Options**, and then select any of the following:

Users12>

Documents0>

Arrangement>

Detail Options^

☒

Include Document Details

☐

Include Graphs

☐

Include Due Dates

Task Optionsv

Output Formatv

View Report

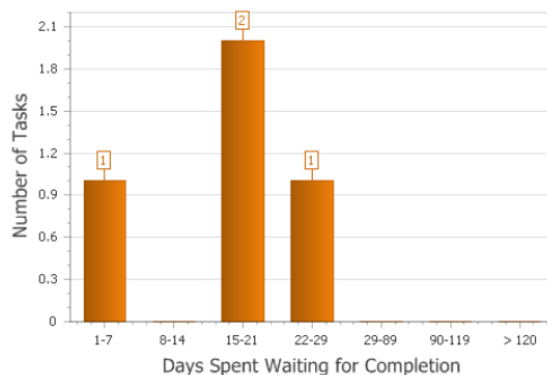
- **Include Document Details:** Shows the tasks associated with each document or questionnaire in the report.

4. Breen, Darren (Personnel Manager)		Site: Corporate Headquarters	Department: Fiscal Services		
			Incomplete	Over 30 Days	
			4	0	
Incomplete Tasks (4)					
	Action	Ref. #	Title (Version)	Start Date	Days Assigned
1.	Waiting	12	Invoice Billings (v.1)	03/15/2013	23
2.	Waiting	18	Performance Evaluation - Accounting Manager (v.1)	03/20/2013	18
3.	Waiting	19	Performance Evaluation - Accounts Payable Clerk (v.1)	03/20/2013	18
4.	Waiting	29	Corrective-Preventive Action Form (v.1)	04/03/2013	5

- **Include Graphs:** Adds a graph to the report's **Summary** area. The graph shows the number of days the selected users' tasks have been waiting for completion.

Summary

Reviewers	Incomplete	Over 30 Days
2	4	0



- **Include Due Dates:** Adds a **Due Date** column to the task details.

Important: This option applies only if the **Include Document Details** option is selected.

Incomplete Tasks (4)

Action	Ref. #	Title (Version)	Start Date	Days Assigned	Due Date
1. Waiting	23	Year End Closing (v.1)	10/30/2014	8	11/11/2014
2. Waiting	22	Unsigned or Partial Pay (v.1)	10/30/2014	8	12/01/2014
3. Waiting	21	Petty Cash (v.1)	10/30/2014	8	N/A
4. Waiting	8	 Chart of Accounts (v.1)	10/30/2014	8	11/05/2014

7. (Optional) Click **Task Options**, and then do any of the following:

- Click a single task status (overdue, incomplete, incomplete with upcoming levels, or complete) or click **Incomplete & Complete Tasks**.

Users

12

>

Documents

0

>

Arrangement>

Detail Options▼

Task Options▲

☐ Only Overdue Tasks

☐ Only Incomplete Tasks

☒ Incomplete Tasks with Upcoming Levels

☐ Only Complete Tasks

☐ Incomplete & Complete Tasks

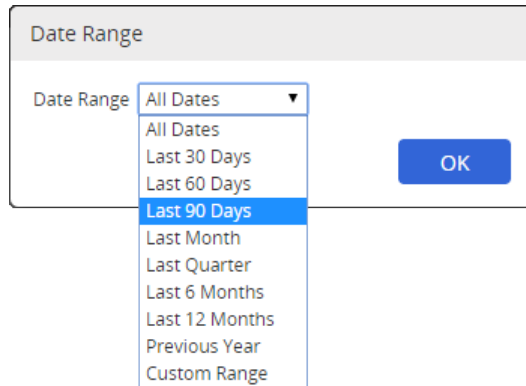
Output Format▼

View Report

If you select **Incomplete Tasks with Upcoming Levels**, information will be shown about any tasks that assigned reviewers have not yet received notification for. These could be tasks for documents or questionnaires that have not yet reached the reviewer status or tasks for documents/questionnaires currently in review but that have not yet reached a reviewer's assigned level.

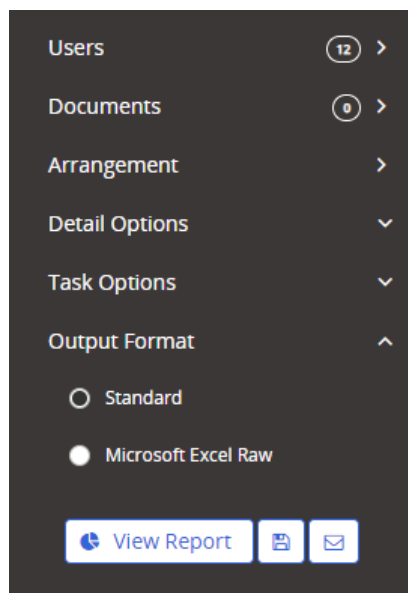
Upcoming Tasks (20)				
Action	Ref. #	Title (Version)	Start Date	Days Assigned
5. Upcoming Task	32	Cash Receipts (v.1)	N/A	N/A
6. Upcoming Task	13	Code Red Procedures (v.1)	N/A	N/A
7. Upcoming Task	31	Draft Document Moved to Approval (v.1)	N/A	N/A

- If you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, the **Date** option appears. To show only the selected tasks that fall within a certain date range, click **Date**, select a date range, and then click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.




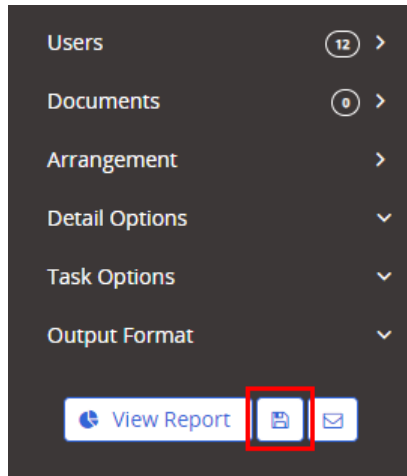
A dialog box titled "Date Range" with a dropdown menu and an "OK" button. The dropdown menu is open, showing the following options: All Dates, Last 30 Days, Last 60 Days, Last 90 Days (highlighted), Last Month, Last Quarter, Last 6 Months, Last 12 Months, Previous Year, and Custom Range.

8. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.




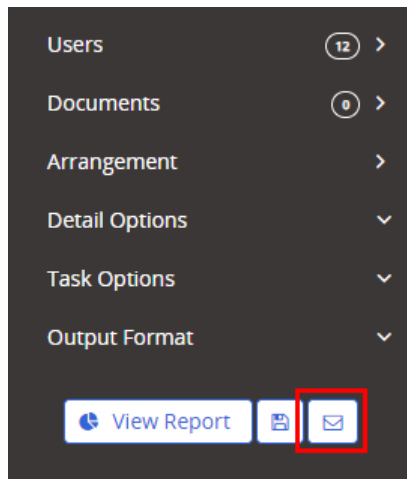
A dark-themed dialog box with a list of settings on the left and two radio buttons on the right. The settings are: Users (12), Documents (0), Arrangement, Detail Options, Task Options, and Output Format (expanded). Under Output Format, there are two radio buttons: Standard (unselected) and Microsoft Excel Raw (selected). At the bottom, there are three buttons: View Report, a save icon, and an email icon.

9. (Optional) To save the current user selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



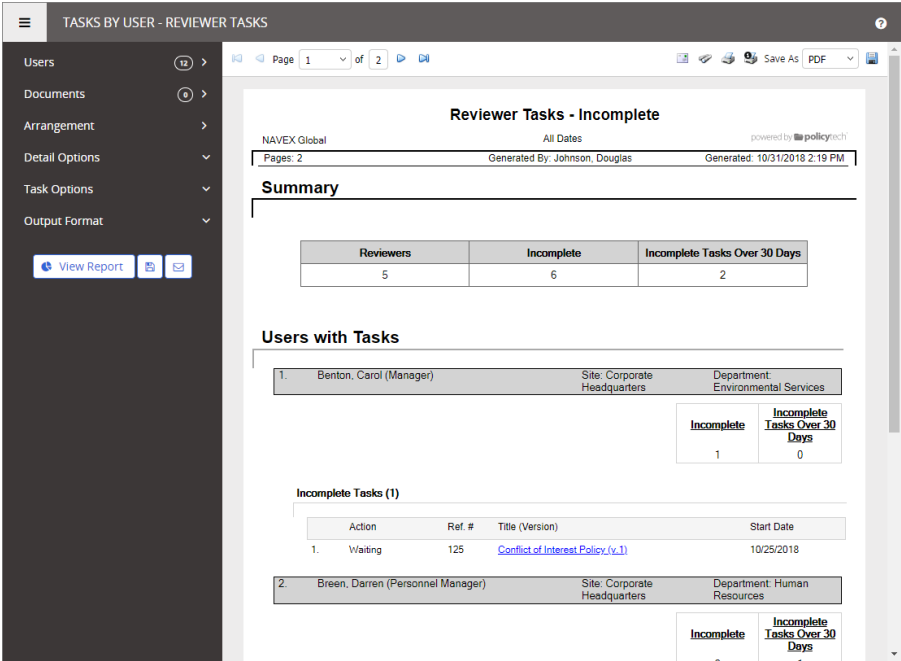
Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

10. (Optional and conditional) Depending on your assigned permissions and email setup, after saving this report you may be able to schedule the summary portion of this report to be automatically generated and emailed to you by clicking  (see [Emailing a Report from a Saved Setup](#) for help).



11. 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**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	L	M	N	O	P	Q	R	S	T
1	First Name	Last Name	Job Title	Unique E-Mail	Site	Depart	Incomplete	Total Tasks	Over 30 Days	Action	Date/Time	Ref. #	Title (Version)	Versic	Start Date	Days	Task Type	Task	
2	Will	Gatos	Chief Inform	wgatos@myc	Corpor	Admin	1	1	1	Waiting	N/A	118	Performance Evaluation	1	11/22/2011	946	Approve	No	
3	Douglas	Johnson	Chief Execu	djohnson@my	Corpor	Admin	1	1	1	Waiting	N/A	139	Training and Tution Rai	1	11/21/2011	947	Approve	No	
4	Lynn	Leonard	Director of E6	lleonard@myc	Corpor	Educa	4	4	4	Waiting	N/A	173	Physical Inventory Proc	1	11/22/2011	946	Approve	No	
5	Lynn	Leonard	Director of E6	lleonard@myc	Corpor	Educa	4	4	4	Waiting	N/A	177	Shipping and Freight Cl	1	11/22/2011	946	Approve	No	
6	Lynn	Leonard	Director of E6	lleonard@myc	Corpor	Educa	4	4	4	Waiting	N/A	176	Receiving, Inspection ai	1	11/22/2011	946	Approve	No	
7	Lynn	Leonard	Director of E6	lleonard@myc	Corpor	Educa	4	4	4	Waiting	N/A	62	Disaster Management F	1	11/22/2011	946	Approve	No	
8	Tony	Potts	Document C	tpotts@poli	Corpor	Admin	2	2	2	Waiting	2	N/A	161	Job Description - Direct	1	11/22/2011	946	Approve	No

Report: Tasks by User - Approver Tasks

Important: This report has been superseded by the [Tasks by User - Current](#) and [Tasks by User - All Tasks](#) reports. Because this report will be removed from PolicyTech in a future release, we strongly recommend using the next-generation reports instead. See [Transitioning to Next-Generation Reports](#) for help.

Description

Provides details about the selected users' assigned approval tasks. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:


Manager, Report Manager, Administrator

Sample Report:

Approver Tasks - Incomplete

NAVEX Global

All Dates

powered by  policytech

Pages: 2

Generated By: Douglas Johnson

Generated: 10/30/2014 10:52

Summary

Approvers	Incomplete	Over 30 Days
5	19	1

Users with Tasks

1. Barnett, John (Approver)

Site: Corporate
Headquarters

Department: Fiscal
Services

Incomplete	Over 30 Days
5	5

Incomplete Tasks (5)

Action	Ref. #	Title (Version)	Start Date	Days Assigned
1. Waiting	217	Bank Account Reconciliation (v.1)	10/14/2014	17
2. Waiting	218	Chart of Accounts (v.1)	10/14/2014	17
3. Waiting	219	Check Requests (v.1)	10/14/2014	17
4. Waiting	220	Petty Cash (v.1)	10/14/2014	17
5. Waiting	216	Account Collections Form (v.2)	08/15/2014	76

2. Howard, Susan (Document, Control Administrator)

Site: Corporate
Headquarters

Department: Administration

Incomplete	Over 30 Days
1	0

Incomplete Tasks (1)

Action	Ref. #	Title (Version)	Start Date	Days Assigned
1. Waiting	233	Vacation Policy (v.1)	10/25/2014	5

3. OnEverything, IncludeMe (Chief Operations Officer)

Site: Corporate
Headquarters

Department: Administration

Incomplete	Over 30 Days
5	0

Incomplete Tasks (5)

Action	Ref. #	Title (Version)	Start Date	Days Assigned
1. Waiting	228	Building Security (v.1)	10/21/2014	9

1/2

1/2

How to Generate

1. Click **Reports**.
2. Click **Superseded Reports**, and then click **ApproverTasks (Tasks by User)**.
3. Select the users you want included in the report (see [Selecting Users](#) for help).

All options available for this report are displayed on the left. Notice that the number of currently selected users is displayed after the **Users** option, which you can click anytime to change your user selection.

Note: If you change your user selection after clicking **View Report**, click **View Report** again to refresh the report contents.

4. (Optional) To limit the selected users to only those assigned to specific documents or questionnaires, click **Documents**, and then select documents/questionnaires in the same way as you would for a document-based report (see [Selecting Documents](#) for help)..
5. (Optional) Click **Arrangement** and do any of the following:

- To change the default report columns, click **Show/Hide Columns**, and then select or click to clear check boxes.

Note: The **Duration** column shows how many days an incomplete task has been assigned or how many days it took to complete a task.

Arrangement

Approvers Found: 7

Last Name	First Name	Job Title	Site
Chen	Jodi	Compliance Officer	Corporate Headquarters
Christenson	Robert	Administrator	Corporate Headquarters
Gatos	Will	Chief Information Officer	Corporate Headquarters
Howard	Susan	Administrator	Corporate Headquarters
Johnson	Douglas	Chief Executive Officer	Corporate Headquarters
Jones	Anne	Chief Finance Officer	Corporate Headquarters
Monson	Teresa	Chief Operations Officer	Corporate Headquarters

Show/Hide Columns

☒ Last Name

☒ First Name

☒ Job Title

☒ Site

☒ Department

☐ Duration

☐ Document Owner

OK

- By default, the user sort order in the report is ascending by last name. To change what the users are sorted by, click a different column heading. Click the same column heading again to reverse the sort order.
6. (Optional) Click **Detail Options**, and then select any of the following:

Users7>

Documents0>

Arrangement>

Detail Options^

☒ Include Document Details

☐ Include Graphs

☐ Include Due Dates

Task Optionsv

Output Formatv

View Report

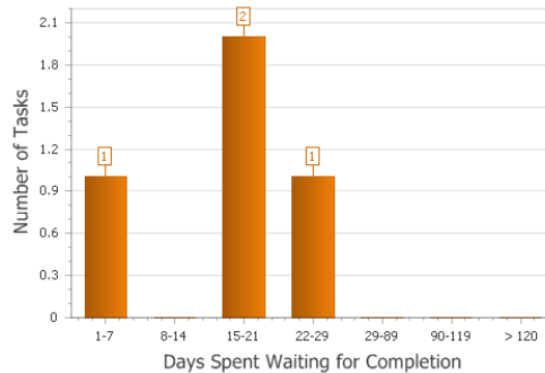
- **Include Document Details:** Shows the tasks associated with each document or questionnaire in the report.

4. Breen, Darren (Personnel Manager)		Site: Corporate Headquarters	Department: Fiscal Services	
			Incomplete	Over 30 Days
			4	0
Incomplete Tasks (4)				
Action	Ref. #	Title (Version)	Start Date	Days Assigned
1. Waiting	12	Invoice Billings (v.1)	03/15/2013	23
2. Waiting	18	Performance Evaluation - Accounting Manager (v.1)	03/20/2013	18
3. Waiting	19	Performance Evaluation - Accounts Payable Clerk (v.1)	03/20/2013	18
4. Waiting	29	Corrective-Preventive Action Form (v.1)	04/03/2013	5

- **Include Graphs:** Adds a graph to the report's **Summary** area. The graph shows the number of days the selected users' tasks have been waiting for completion.

Summary

Approvers	Incomplete	Over 30 Days
5	19	1



- **Include Due Dates:** Adds a **Due Date** column to the task details.

Important: This option applies only if the **Include Document Details** option is selected.

Incomplete Tasks (4)

Action	Ref. #	Title (Version)	Start Date	Duration	Days Assigned
1. Waiting	12	Invoice Billings (v.1)	03/15/2013	23	03/29/2013
2. Waiting	18	Performance Evaluation - Accounting Manager (v.1)	03/20/2013	18	04/03/2013
3. Waiting	19	Performance Evaluation - Accounts Payable Clerk (v.1)	03/20/2013	18	04/03/2013
4. Waiting	297	Corrective-Preventive Action Form (v.1)	04/03/2013	5	N/A

7. (Optional) Click **Task Options**, and then do any of the following:

- Click a single task status (overdue, incomplete, incomplete with upcoming levels, or complete) or click **Incomplete & Complete Tasks**.

Users7>

Documents0>

Arrangement>

Detail Optionsv

Task Options^

☐ Only Overdue Tasks

☐ Only Incomplete Tasks

☐ Incomplete Tasks with Upcoming Levels

☐ Only Complete Tasks

☐ Incomplete & Complete Tasks

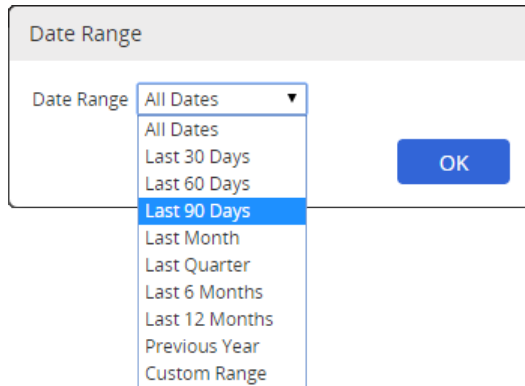
Output Formatv

View Report

If you select **Incomplete Tasks with Upcoming Levels**, information will be shown about any tasks that assigned reviewers have not yet received notification for. These could be tasks for documents or questionnaires that have not yet reached the reviewer status or tasks for documents/questionnaires currently in review but that have not yet reached a reviewer's assigned level.

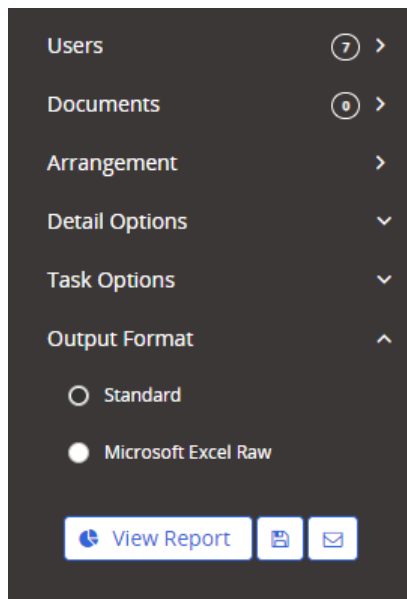
Upcoming Tasks (20)				
Action	Ref. #	Title (Version)	Start Date	Days Assigned
5. Upcoming Task	32	Cash Receipts (v.1)	N/A	N/A
6. Upcoming Task	13	Code Red Procedures (v.1)	N/A	N/A
7. Upcoming Task	31	Draft Document Moved to Approval (v.1)	N/A	N/A

- If you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, the **Date** option appears. To show only the selected tasks that fall within a certain date range, click **Date**, select a date range, and then click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.




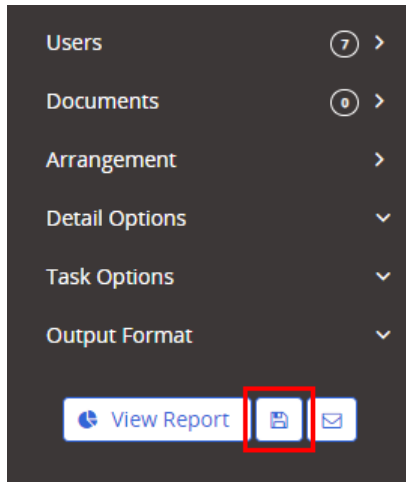
A dialog box titled "Date Range" with a dropdown menu and an "OK" button. The dropdown menu is open, showing the following options: All Dates, Last 30 Days, Last 60 Days, Last 90 Days (highlighted), Last Month, Last Quarter, Last 6 Months, Last 12 Months, Previous Year, and Custom Range.

8. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.




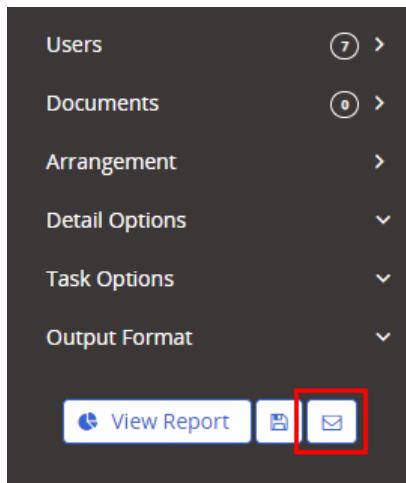
A dark-themed dialog box titled "Output Format" with two radio buttons and a "View Report" button. The radio buttons are labeled "Standard" and "Microsoft Excel Raw". The "Microsoft Excel Raw" radio button is selected. At the bottom, there is a "View Report" button with a circular arrow icon, and two smaller buttons with document and email icons.

9. (Optional) To save the current user selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

10. (Optional and conditional) Depending on your assigned permissions and email setup, after saving this report you may be able to schedule the summary portion of this report to be automatically generated and emailed to you by clicking  (see [Emailing a Report from a Saved Setup](#) for help).



11. 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.

Report interface for "Approver Tasks - Incomplete". The interface includes a sidebar with navigation options (Users, Documents, Arrangement, Detail Options, Task Options, Output Format) and a main content area. The main content area displays a summary table and a list of users with tasks.

Approvers	Incomplete	Incomplete Tasks Over 30 Days
8	26	24

Users with Tasks

1. Howard, Susan (Document, Control Administrator)	Site: Corporate Headquarters	Department: Administration
	Incomplete	Incomplete Tasks Over 30 Days
	1	1

Incomplete Tasks (1)

Action	Ref. #	Title (Version)	Start Date
1. Waiting	233	Chart of Accounts (v.1)	01/25/2011

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	First Name	Last Name	Job Title	Unique E-Mail	Site	Department	Incomplete	Total Tasks	Over 30 Days	Action	Date/Time	Ref. #	Title (Version)		Version	Start Date	Days	Task Type	Task Status	
2	Will	Gatos	Chief Inform	wgatos@myc	Corporate Admin		1	1	1	Waiting	N/A	118	Performance Evaluation		1	11/22/2011	946	Approve	No	
3	Douglas	Johnson	Chief Execu	djohnson@myc	Corporate Admin		1	1	1	Waiting	N/A	139	Training and Tuition Rei		1	11/21/2011	947	Approve	No	
4	Lynn	Leonard	Director of E	lleonard@myc	Corporate Educat		4	4	4	Waiting	N/A	173	Physical Inventory Proc		1	11/22/2011	946	Approve	No	
5	Lynn	Leonard	Director of E	lleonard@myc	Corporate Educat		4	4	4	Waiting	N/A	177	Shipping and Freight Cl		1	11/22/2011	946	Approve	No	
6	Lynn	Leonard	Director of E	lleonard@myc	Corporate Educat		4	4	4	Waiting	N/A	176	Receiving, Inspection ai		1	11/22/2011	946	Approve	No	
7	Lynn	Leonard	Director of E	lleonard@myc	Corporate Educat		4	4	4	Waiting	N/A	62	Disaster Management F		1	11/22/2011	946	Approve	No	
8	Tony	Potts	Document C	tpotts@myc	Corporate Admin		2	2	2	Waiting	N/A	161	Job Description - Direct		1	11/22/2011	946	Approve	No	

Report: Tasks by User - Assignee Tasks

Important: This report has been superseded by the [Tasks by User - Current](#) and [Tasks by User - All Tasks](#) reports. Because this report will be removed from PolicyTech in a future release, we strongly recommend using the next-generation reports instead. See [Transitioning to Next-Generation Reports](#) for help.

Description

Provides details about the selected users' assigned reading tasks. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:

Manager, Report Manager, Administrator

Sample Report:

Reader Tasks - Incomplete

NAVEX Global

All Dates

powered by  policytech

Pages: 3

Generated By: Susan Howard

Generated: 04/16/2013 5:03 PM

Summary

Readers	Incomplete	Over 30 Days
42	29	15

Users with Tasks

1. Howard, Susan (Document, Control Administrator)	Site: Corporate Headquarters	Department: Fiscal Services
	Incomplete	Over 30 Days
	4	1

Incomplete Tasks (4)

Action	Ref. #	Title (Version)	Start Date	Days Assigned
1. Incomplete	27	Account Collections Form (v.1)	03/15/2013	32
2. Incomplete	33	Accounts Payable and Cash Distribution (v.1)	03/30/2013	17
3. Incomplete	94	Bas NSF Checks (v.1)	04/05/2013	11
4. Incomplete	56	Cash Drawers (v.1)	04/05/2013	11
5. Incomplete	77	Year End Closing (v.1)	04/04/2013	12

2. Johnson, Douglas (Chief Executive Officer)	Site: Corporate Headquarters	Department: Fiscal Services
	Incomplete	Over 30 Days
	4	1

Incomplete Tasks (3)

Action	Ref. #	Title (Version)	Start Date	Days Assigned
1. Incomplete	42	Recovery Process (v.3)	04/11/2013	4
2. Incomplete	13	Style Guide 2 (v.1)	04/08/2013	7
3. Incomplete	26	Unsigned or Partial Pay 2 (v.1)	04/05/2013	10

1/11

How to Generate

1. Click **Reports**.
2. Click **Superseded Reports** and then click **Reader Tasks (Tasks by User)**.
3. Select the users you want included in the report (see [Selecting Users](#) for help).

All options available for this report are displayed on the left. Notice that the number of currently selected users is displayed after the **Users** option, which you can click anytime to change your user selection.

Note: If you change your user selection after clicking **View Report**, click **View Report** again to refresh the report contents.

4. (Optional) To limit the selected users to only those assigned to specific documents or questionnaires, click **Documents**, and then select documents/questionnaires in the same way as you would for a document-based report (see [Selecting Documents](#) for help)..
5. (Optional) Click **Arrangement** and do any of the following:

- To change the default report columns, click **Show/Hide Columns**, and then select or click to clear check boxes.

Note: The **Duration** column shows how many days an incomplete task has been assigned or how many days it took to complete a task.

Arrangement

Assignees Found: 11

Last Name	First Name	Job Title	Site
Addison	Victoria	Accountant	Corporate Headquarters
Cash	Jordon	Accounts Payable Clerk	Corporate Headquarters
Chen	Jodi	Compliance Officer	Corporate Headquarters
Gatos	Will	Chief Information Officer	Corporate Headquarters
Gifford	Tawna	Accounts Receivable Clerk	Corporate Headquarters
Hansen	Tom	Accounting Manager	Corporate Headquarters
Howard	Susan	Administrator	Corporate Headquarters
Johnson	Douglas	Chief Executive Officer	Corporate Headquarters
Jones	Anne	Chief Finance Officer	Corporate Headquarters
Monson	Teresa	Chief Operations Officer	Corporate Headquarters

Show/Hide Columns

☒ Last Name

☒ First Name

☒ Job Title

☒ Site

☒ Department

☐ Duration

☐ Document Owner

Page 1 of 2 Records 1 - 10

OK

- By default, the user sort order in the report is ascending by last name. To change what the users are sorted by, click a different column heading. Click the same column heading again to reverse the sort order.

6. (Optional) Click **Detail Options**, and then select any of the following:

Users

11

Documents

0

Arrangement

Detail Options

☒ Include Document Details

☐ Include Graphs

☐ Include Due Dates

Task Options

Output Format

View Report

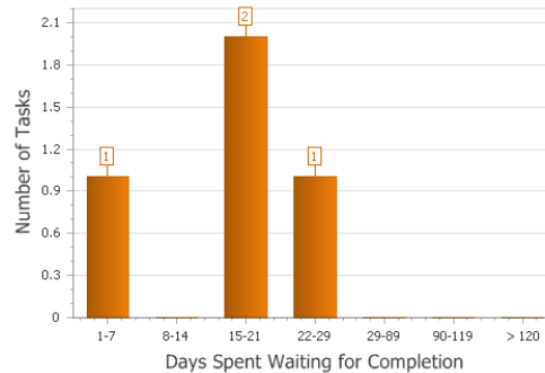
- **Include Document Details:** Shows the tasks associated with each document or questionnaire in the report.

4. Breen, Darren (Personnel Manager)		Site: Corporate Headquarters	Department: Fiscal Services	
			Incomplete	Over 30 Days
			4	0
Incomplete Tasks (4)				
Action	Ref. #	Title (Version)	Start Date	Days Assigned
1. Waiting	12	Invoice Billings (v.1)	03/15/2013	23
2. Waiting	18	Performance Evaluation - Accounting Manager (v.1)	03/20/2013	18
3. Waiting	19	Performance Evaluation - Accounts Payable Clerk (v.1)	03/20/2013	18
4. Waiting	29	Corrective-Preventive Action Form (v.1)	04/03/2013	5

- **Include Graphs:** Adds a graph to the report's **Summary** area. The graph shows the number of days the selected users' tasks have been waiting for completion.

Summary

Readers	Incomplete	Over 30 Days
13	56	5



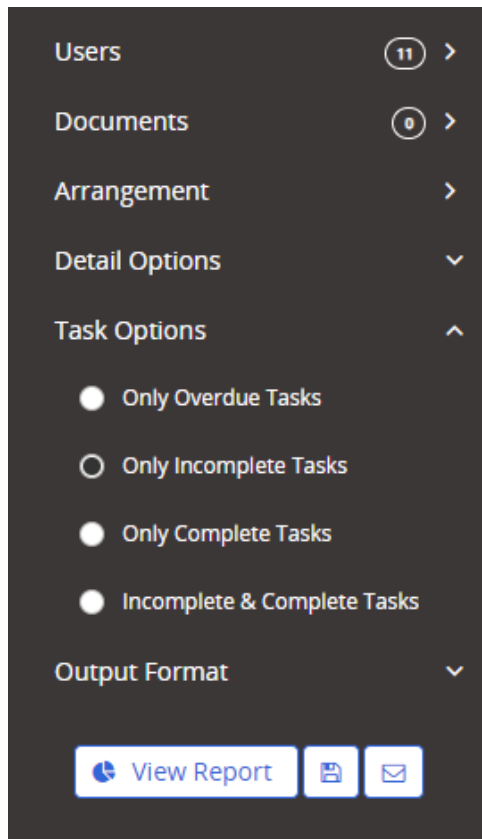
- **Include Due Dates:** Adds a **Due Date** column to the task details.

Important: This option applies only if the **Include Document Details** option is selected.

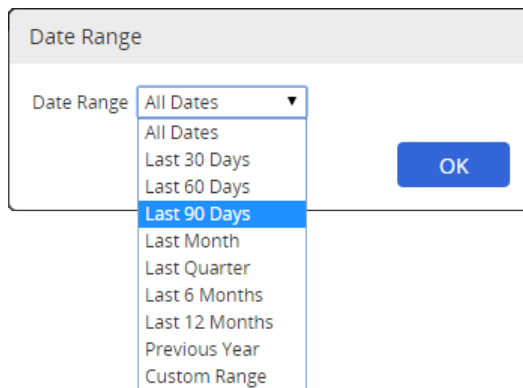
1. Cash, Jordon (Accounts Payable Clerk)			Site: Corporate Headquarters	Department: Accounting		
				Incomplete	Over 30 Days	
				12	1	
Incomplete Tasks (12)						
	Action	Ref. #	Title (Version)	Start Date	Days Assigned	Due Date
1.	Incomplete	242	 Vacation Policy (v.1)	01/14/2011	39	10/31/2014
2.	Incomplete	253	Inventory Sheet (v.2)	08/29/2011	11	11/28/2014
3.	Incomplete	2	Accounts Payable and Cash Distribution (v.1)	11/15/2011	10	10/27/2014
4.	Incomplete	207	Cash Receipts (v.1)	06/30/2014	12	N/A

7. (Optional) Click **Task Options**, and then do any of the following:

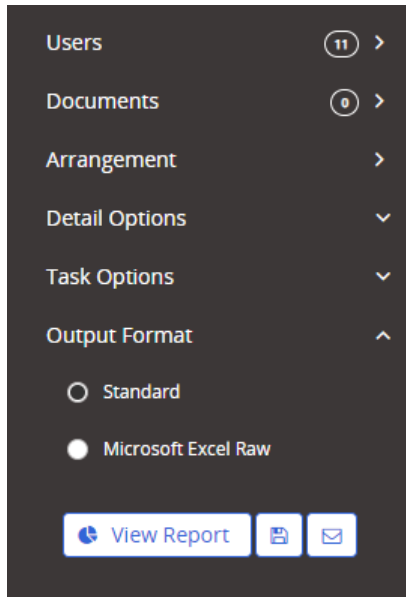
- Click a single task status (overdue, incomplete, or complete) or click **Incomplete & Complete Tasks**.




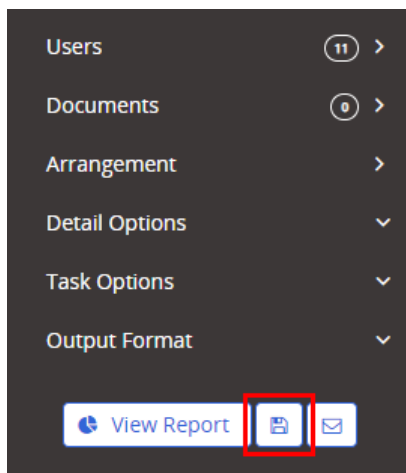
- If you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, the **Date** option appears. To show only the selected tasks that fall within a certain date range, click **Date**, select a date range, and then click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.




8. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.

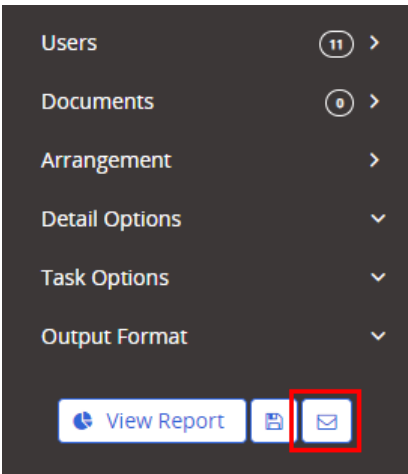


9. (Optional) To save the current user selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



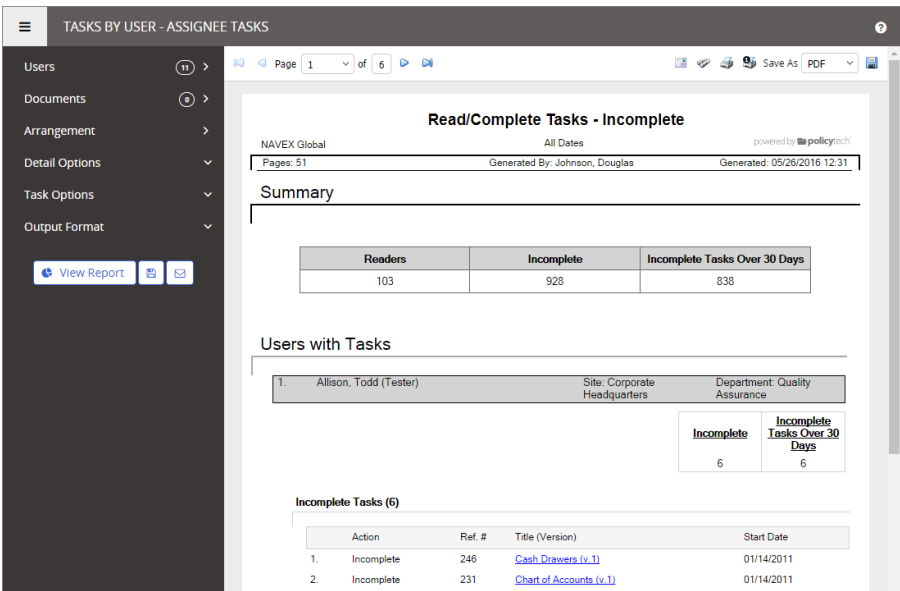
Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

10. (Optional and conditional) Depending on your assigned permissions and email setup, after saving this report you may be able to schedule the summary portion of this report to be automatically generated and emailed to you by clicking  (see [Emailing a Report from a Saved Setup](#) for help).



11. 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**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	First Name	Last Name	Job Title	Unique E-Mail	Site	Department	Incomplete	Total Tasks	Over 30 Days	Action	Date/Time	Ref #	Title (Version)	Versic	Start Date	Days	Task Type	Task		
2	Will	Gatos	Chief Inform	38	vgatos@myc	Corpor Admin	1	1	1	Waiting	N/A	118	Performance Evaluation	1	11/22/2011	946	Approve	No		
3	Douglas	Johnson	Chief Execu	2	djohnson@my	Corpor Admin	1	1	1	Waiting	N/A	139	Training and Tuition Rei	1	11/21/2011	947	Approve	No		
4	Lynn	Leonard	Director of E	6	lleonard@myi	Corpor Educat	4	4	4	Waiting	N/A	173	Physical Inventory Proc	1	11/22/2011	946	Approve	No		
5	Lynn	Leonard	Director of E	6	lleonard@myi	Corpor Educat	4	4	4	Waiting	N/A	177	Shipping and Freight Cl	1	11/22/2011	946	Approve	No		
6	Lynn	Leonard	Director of E	6	lleonard@myi	Corpor Educat	4	4	4	Waiting	N/A	176	Receiving, Inspection a	1	11/22/2011	946	Approve	No		
7	Lynn	Leonard	Director of E	6	lleonard@myi	Corpor Educat	4	4	4	Waiting	N/A	62	Disaster Management f	1	11/22/2011	946	Approve	No		
8	Tony	Potts	Document C	GoCube	tpotts@bolle	Corpor Admin	2	2	2	Waiting	2	161	Job Description - Direct	1	11/22/2011	946	Approve	No		

Report: Document Owner - Resubmit for Review Tasks

Important: This report has been superseded by the [Tasks by User - Current](#) and [Tasks by User - All Tasks](#) reports. Because this report will be removed from PolicyTech in a future release, we strongly recommend using the next-generation reports instead. See [Transitioning to Next-Generation Reports](#) for help.

Description

Provides details about the selected users' tasks for resubmitting a document or questionnaire for review after it has been returned to draft status from review or approval. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:


Manager, Report Manager, Administrator

Sample Report:

Document Owner Tasks - Incomplete Tasks

NAVEX Global

All Dates

powered by  policytech

Pages: 2

Generated By: Douglas Johnson

Generated: 11/07/2014 08:26

Summary

Document Owners	Incomplete	Over 30 Days
3	5	5

Users with Tasks

1. Hansen, Tom (Accounting Manager)	Site: Corporate Headquarters	Department: Accounting
	<u>Incomplete</u>	<u>Over 30 Days</u>
	1	1

Incomplete Tasks (1)

Action	Ref. #	Title (Version)	Start Date	Days Assigned
1. Waiting	327	Bank Account Reconciliation - South Branch (v.1)	09/26/2014	42

2. Howard, Susan (Document, Control Administrator)	Site: Corporate Headquarters	Department: Administration
	<u>Incomplete</u>	<u>Over 30 Days</u>
	1	1

Incomplete Tasks (1)

Action	Ref. #	Title (Version)	Start Date	Days Assigned
1. Waiting	206	Bank Account Reconciliation - Downtown Branch (v.1)	06/30/2014	129

3. Johnson, Douglas (Chief Executive Officer)	Site: Corporate Headquarters	Department: Administration
	<u>Incomplete</u>	<u>Over 30 Days</u>
	3	3

Incomplete Tasks (3)

Action	Ref. #	Title (Version)	Start Date	Days Assigned
1. Waiting	11	Bank Account Reconciliation - East Branch (v.1)	06/30/2014	129
2. Waiting	324	La Politique des Heures Supplémentaires (v.1)	09/25/2014	42
3. Waiting	325	La Politique des Heures Supplémentaires (v.1)	09/25/2014	42

1/2

1/2

How to Generate

1. Click **Reports**.
2. Click **Superseded Reports**, and then click **Document Owner - Resubmit for Review Tasks (Tasks by User)**.
3. Select the users you want included in the report (see [Selecting Users](#) for help).

All options available for this report are displayed on the left. Notice that the number of currently selected users is displayed after the **Users** option, which you can click anytime to change your user selection.

Note: If you change your user selection after clicking **View Report**, click **View Report** again to refresh the report contents.

4. (Optional) To limit the selected users to only those assigned to specific documents or questionnaires, click **Documents**, and then select documents/questionnaires in the same way as you would for a document-based report (see [Selecting Documents](#) for help)..
5. (Optional) Click **Arrangement** and do any of the following:

- To change the default report columns, click **Show/Hide Columns**, and then select or click to clear check boxes.

Note: The **Duration** column shows how many days an incomplete task has been assigned or how many days it took to complete a task.

The screenshot shows a window titled 'Arrangement' with a close button (X) in the top right corner. Below the title bar, it says 'Document Owners Found: 4'. There is a table with four columns: 'Last Name', 'First Name', 'Job Title', and 'Site'. The table contains four rows of data. A 'Show/Hide Columns' dialog box is open over the table, with a red rectangle highlighting it. The dialog box has a title bar and a list of columns with checkboxes: 'Last Name' (checked), 'First Name' (checked), 'Job Title' (checked), 'Site' (checked), 'Department' (checked), 'Duration' (unchecked), and 'Document Owner' (unchecked). An 'OK' button is at the bottom right of the dialog box.

Last Name	First Name	Job Title	Site
Gatos	Will	Chief Information Officer	Corporate Headquarters
Hansen	Tom	Accounting Manager	Corporate Headquarters
Johnson	Douglas	Chief Executive Officer	Corporate Headquarters
Monson	Teresa	Chief Operations Officer	Corporate Headquarters Administration

- By default, the user sort order in the report is ascending by last name. To change what the users are sorted by, click a different column heading. Click the same column heading again to reverse the sort order.
6. (Optional) Click **Detail Options**, and then select any of the following:

Users4>

Documents0>

Arrangement>

Detail Options^

☒ Include Document Details

☐ Include Graphs

☐ Include Due Dates

Output Formatv

View Report

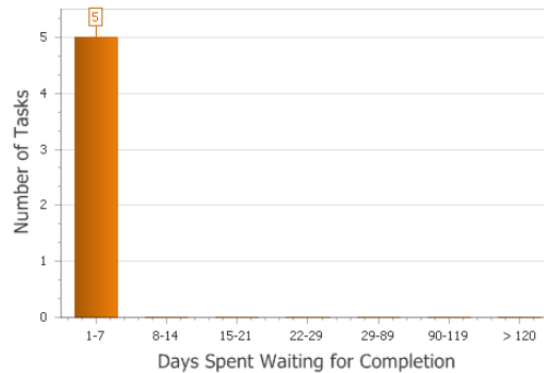
- **Include Document Details:** Shows the tasks associated with each document or questionnaire in the report.

4. Breen, Darren (Personnel Manager)		Site: Corporate Headquarters	Department: Fiscal Services	
		Incomplete	Over 30 Days	
		4	0	
Incomplete Tasks (4)				
Action	Ref. #	Title (Version)	Start Date	Days Assigned
1. Waiting	12	Invoice Billings (v.1)	03/15/2013	23
2. Waiting	18	Performance Evaluation - Accounting Manager (v.1)	03/20/2013	18
3. Waiting	19	Performance Evaluation - Accounts Payable Clerk (v.1)	03/20/2013	18
4. Waiting	29	Corrective-Preventive Action Form (v.1)	04/03/2013	5

- **Include Graphs:** Adds a graph to the report's **Summary** area. The graph shows the number of days the selected users' tasks have been waiting for completion.

Summary

Document Owners	Incomplete	Over 30 Days
3	5	5

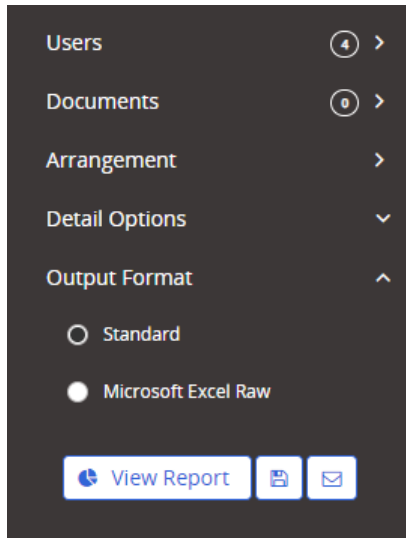



- **Include Due Dates:** Adds a **Due Date** column to the task details.

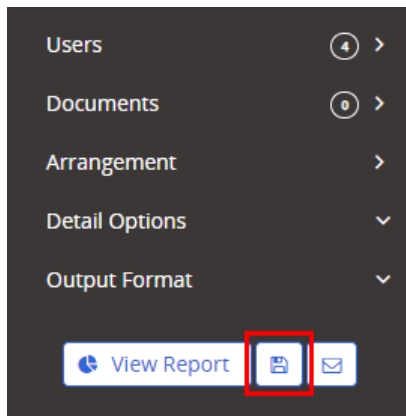
Important: This option applies only if the **Include Document Details** option is selected.

1. Cash, Jordon (Accounts Payable Clerk)		Site: Corporate Headquarters	Department: Accounting		
			Incomplete	Over 30 Days	
			12	1	
Incomplete Tasks (12)					
Action	Ref. #	Title (Version)	Start Date	Days Assigned	Due Date
1. Incomplete	242	 Vacation Policy (v.1)	01/14/2011	39	10/31/2014
2. Incomplete	253	Inventory Sheet (v.2)	08/29/2011	11	11/28/2014
3. Incomplete	2	Accounts Payable and Cash Distribution (v.1)	11/15/2011	10	10/27/2014
4. Incomplete	207	Cash Receipts (v.1)	06/30/2014	12	N/A


7. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.

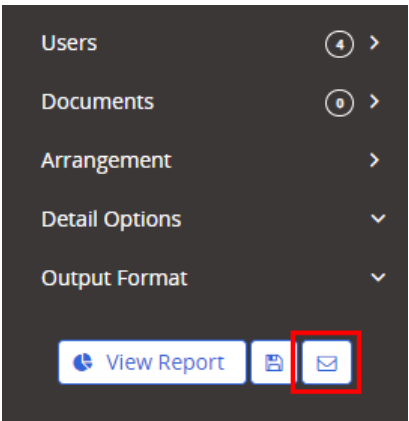


8. (Optional) To save the current user selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

9. (Optional and conditional) Depending on your assigned permissions and email setup, after saving this report you may be able to schedule the summary portion of this report to be automatically generated and emailed to you by clicking  (see [Emailing a Report from a Saved Setup](#) for help).



10. 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.

A screenshot of the 'Document Owner Tasks - Incomplete Tasks' report. The report is titled 'Document Owner Tasks - Incomplete Tasks' and is powered by PolicyTech. It shows a summary table with columns 'Document Owners', 'Incomplete', and 'Incomplete Tasks Over 30 Days'. Below this is a section 'Users with Tasks' showing a table for Hansen, Tom (Accounting Manager). At the bottom, there is a section 'Incomplete Tasks (11)' with a table listing tasks such as 'Laboratory Safety Guidelines (v.1)', 'Job Description - Accountant (v.1)', 'Vacation Policy (v.2)', 'Fixed Asset Control (v.1)', 'Travel Policy (North America) (v.1)', and 'Hiring Policy (v.1)'. The report includes navigation controls like 'Page 1 of 2' and 'Save As' options.

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	First Name	Last Name	Job Title	Unique E-Mail	Site	Depart	Incomplete	Total Tasks	Over 30 Days	Action	Date/Time	Ref #	Title (Version)	Versic	Start Date	Days	Task Type	Task		
2	Will	Gatos	Chief Inform	38	wgatos@myc	Corpori Admin	1	1	1	Waiting	N/A	119	Performance Evaluation	1	11/22/2011	946	Approve	No		
3	Douglas	Johnson	Chief Execu	2	djohnson@gm	Corpori Admin	1	1	1	Waiting	N/A	139	Training and Tuition Rai	1	11/21/2011	947	Approve	No		
4	Lynn	Leonard	Director of E6		lleonard@myc	Corpori Educat	4	4	4	Waiting	N/A	173	Physical Inventory Proc	1	11/22/2011	946	Approve	No		
5	Lynn	Leonard	Director of E6		lleonard@myc	Corpori Educat	4	4	4	Waiting	N/A	177	Shipping and Freight Cl	1	11/22/2011	946	Approve	No		
6	Lynn	Leonard	Director of E6		lleonard@myc	Corpori Educat	4	4	4	Waiting	N/A	176	Receiving, Inspection ai	1	11/22/2011	946	Approve	No		
7	Lynn	Leonard	Director of E6		lleonard@myc	Corpori Educat	4	4	4	Waiting	N/A	62	Disaster Management F	1	11/22/2011	946	Approve	No		
8	Tom	Putts	Document C	GoCubs	twatts@brooks	Corpori Admin	2	2	2	Waiting	N/A	161	Job Description - Direct	1	11/22/2011	946	Approve	No		

Report: Tasks by User - All Workflow Tasks

Important: This report has been superseded by the [Tasks by User - Current](#) and [Tasks by User - All Tasks](#) reports. Because this report will be removed from PolicyTech in a future release, we strongly recommend using the next-generation reports instead. See [Transitioning to Next-Generation Reports](#) for help.

Description

Provides details about all of the selected users' assigned tasks. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:


Manager, Report Manager, Administrator

Sample Report:

All Workflow Tasks - Incomplete

NAVEX Global

All Dates

powered by 

Pages: 4

Generated By: Douglas Johnson

Generated: 2014/10/01 07:46

Summary

Workflow	** Number of Users	Incomplete	Over 30 Days
Write	1	2	2
Review	0	0	0
Approve	0	0	0
Read	4	80	66
Periodic Review	2	3	3
Link Update	1	2	2
Total	N/A	87	73

** The sum of this column may not equal the total listed since users can be assigned to multiple roles.

Users with Tasks

1. Cash, Jordon (Accounts Payable Clerk)		Site: Corporate Headquarters	Department: Accounting	
Workflow	Incomplete	Over 30 Days		
Read	12	10		
Periodic Review	1	1		
Total	13	11		

Incomplete Tasks (12)

Action	Ref. #	Title (Version)	Days Assigned	Task Type
1. Waiting	2	Accounts Payable and Cash Distribution (v.1)	10	Periodic Review
2. Waiting	3	Bad NSF Checks (v.1)	9	Periodic Review
3. Waiting	258	Audit Schedule (v.1)	9	Link Update
4. Waiting	258	Audit Schedule (v.1)	9	Link Update
5. Incomplete	243	Archive Doc (v.1)	13	Read
6. Incomplete	244	Create New Version (v.1)	13	Read
7. Incomplete	246	Mark as Read (Required) (v.1)	13	Read
8. Incomplete	260	Special Characters (v.1)	13	Read
9. Incomplete	242	Vacation Policy (v.1)	13	Read
10. Incomplete	235	Pnd. Archive Document (v.1)	13	Read
11. Incomplete	216	Ap. Accept (v.1)	13	Read

1/4

1/4

How to Generate

1. Click **Reports**.
2. Click **Superseded Reports**, and then click **All Workflow Tasks (Tasks by User)**.
3. Select the users you want included in the report (see [Selecting Users](#) for help).

Note: The default selection is the **Users** tab, which lets you search for users and add them one at a time. To add multiple users at once, use the **Departments** or **Job Titles** tab.

Users

Site: Corporate Headquarters

Show Archived Users (In Red)

Departments Job Titles Users

Search Users

Assignee Groups

- Multi-Site (Global) Groups
- Corporate Headquarters
 - All Accounting Job Titles
 - All Assignees - Corporate Headquarters
 - All Executive Job Titles
 - All Programming Job Titles
 - Managers

Users (Loading may take several minutes)

Shift+Click selects a span of checkboxes.

OK

All options available for this report are displayed on the left. Notice that the number of currently selected users is displayed after the **Users** option, which you can click anytime to change your user selection.

Note: If you change your user selection after clicking **View Report**, click **View Report** again to refresh the report contents.

TASKS BY USERS - ALL WORKFLOW TASKS

Users 42

Documents 8

Arrangement

Detail Options

Task Options

Output Format

View Report

Please choose options on the left, then click View Report.

NAVEX GLOBAL

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- (Optional) To limit the selected users to only those assigned to specific documents or questionnaires, click **Documents**, and then select documents/questionnaires in the same way as you would for a document-based report (see [Selecting Documents](#) for help)..
- (Optional) Click **Arrangement** and do any of the following:

- To change the default report columns, click **Show/Hide Columns**, and then select or click to clear check boxes.

Note: The **Duration** column shows how many days an incomplete task has been assigned or how many days it took to complete a task.

The screenshot shows a window titled 'Arrangement' with a close button (X) in the top right corner. Below the title bar, it says 'Users Found: 42'. A table displays user information with columns: Last Name, First Name, Job Title, Site, and an unlabeled column. The table lists 10 users. A 'Show/Hide Columns' dialog box is open, showing a list of columns with checkboxes: Last Name (checked), First Name (checked), Job Title (checked), Site (checked), Department (checked), Duration (unchecked), and Document Owner (unchecked). The dialog box is highlighted with a red rectangle. At the bottom of the window, there is a pagination bar showing 'Page 1 of 5' and 'Records 1 - 10', and an 'OK' button.

Last Name	First Name	Job Title	Site	
Addison	Victoria	Accountant	Corporate Headquarters	
Allison	Todd	Tester	Corporate Headquarters	
Benton	Carol	Manager	Corporate Headquarters	
Breen	Darren	Personnel Manager	Corporate Headquarters	Human Resources
Calfus	Steven	MSDS Technician	Corporate Headquarters	Disaster Recovery
Cane	Taylor	Tester	Corporate Headquarters	Quality Assurance
Cash	Jordon	Accounts Payable Clerk	Corporate Headquarters	Accounting
Chen	Jodi	Compliance Officer	Corporate Headquarters	Administration
Christenson	Robert	Administrator	Corporate Headquarters	Technical Services
Dennison	Betty	Programmer	Corporate Headquarters	Software Development

- By default, the user sort order in the report is ascending by last name. To change what the users are sorted by, click a different column heading. Click the same column heading again to reverse the sort order.

6. (Optional) Click **Detail Options**, and then select any of the following:

Users42>

Documents0>

Arrangement>

Detail Options^

☒ Include Document Details

☐ Include Graphs

☐ Include Due Dates

Task Optionsv

Output Formatv

View Report

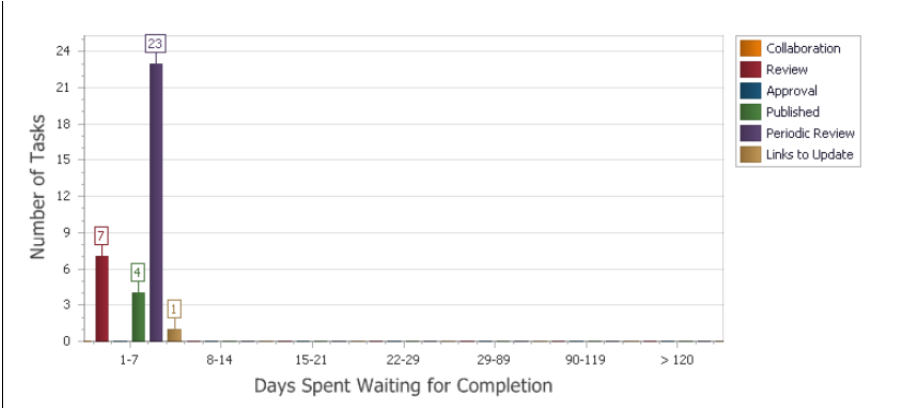
- **Include Document Details:** Shows the tasks associated with each document or questionnaire in the report.

1. Cash, Jordon (Accounts Payable Clerk)		Site: Corporate Headquarters	Department: Accounting	
		Workflow	Incomplete	Over 30 Days
		Read	12	10
		Periodic Review	1	1
		Total	13	11

Incomplete Tasks (13)

Action	Ref. #	Title (Version)	Days Assigned	Task Type
1. Waiting	252	Cash Receipts (v.1)	45	Periodic Review
2. Incomplete	242	Vacation Policy (v.1)	1392	Read
3. Incomplete	253	Inventory Sheet (v.2)	1164	Read

- **Include Graphs:** Adds a graph to the report's Summary area. The graph shows the number of days the selected users' tasks have been waiting for completion.



- **Include Due Dates:** Adds a **Due Date** column to the task details.

Important: This option applies only if the **Include Document Details** option is selected.

Incomplete Tasks (6)

Action	Ref. #	Title (Version)	Due Date	Days Assigned	Task Type
1. Waiting	2	Accounts Payable and Cash Distribution (v.1)	10/19/2014	27	Periodic Review
2. Waiting	3	Bad NSF Checks (v.1)	09/30/2014	45	Periodic Review
3. Waiting	5	Capitilization (v.2)	11/02/2014	11	Periodic Review
4. Incomplete	2	Accounts Payable and Cash Distribution (v.1)	12/05/2014	16	Read

7. (Optional) Click **Task Options**, and then do any of the following:

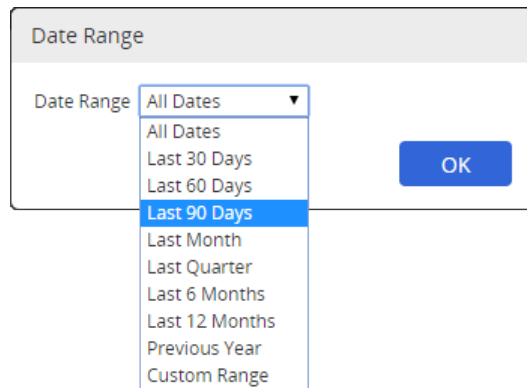
- Click a single task status (overdue, incomplete, or complete) or click **Incomplete & Complete Tasks**.

The screenshot shows a dark-themed menu with the following options:

- Users (42) >
- Documents (0) >
- Arrangement >
- Detail Options ▾
- Task Options ▲
 - ☒ Only Overdue Tasks
 - ☐ Only Incomplete Tasks
 - ☐ Only Complete Tasks
 - ☐ Incomplete & Complete Tasks
- Output Format ▾

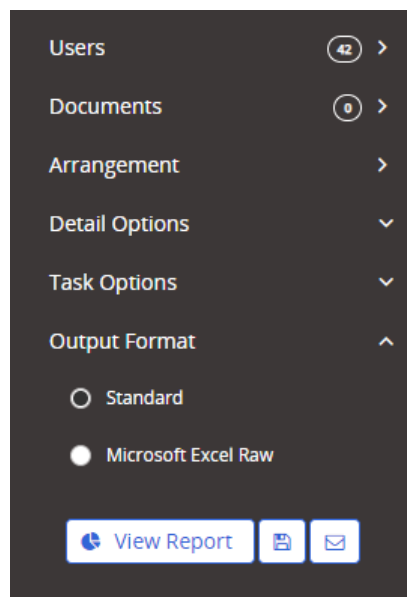
At the bottom, there are three buttons: "View Report" (with a magnifying glass icon), a save icon, and an email icon.

- If you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, the **Date** option appears. To show only the selected tasks that fall within a certain date range, click **Date**, select a date range, and then click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.




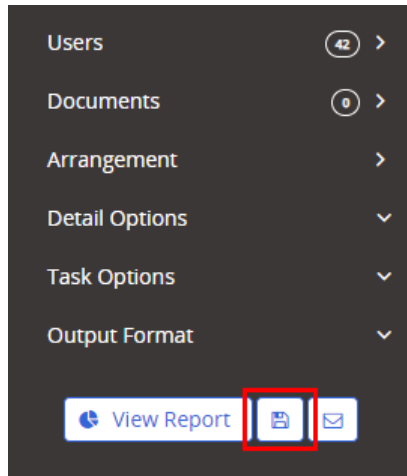
A dialog box titled "Date Range" with a dropdown menu and an "OK" button. The dropdown menu is open, showing the following options: All Dates, Last 30 Days, Last 60 Days, Last 90 Days (highlighted), Last Month, Last Quarter, Last 6 Months, Last 12 Months, Previous Year, and Custom Range.

8. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.



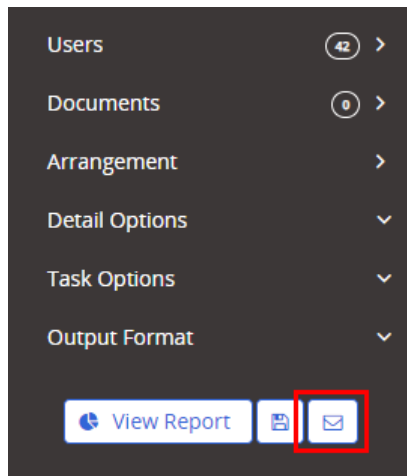
A dark-themed dialog box titled "Output Format" with two radio button options: "Standard" and "Microsoft Excel Raw". The "Microsoft Excel Raw" option is selected. At the bottom, there are three buttons: "View Report" (with a magnifying glass icon), a save icon, and an email icon.

9. (Optional) To save the current user selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



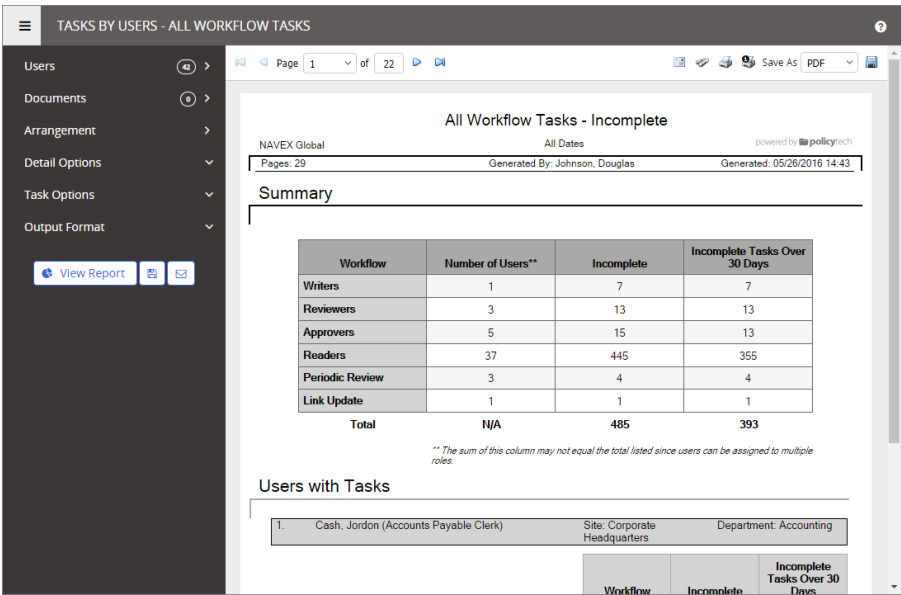
Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

10. (Optional and conditional) Depending on your assigned permissions and email setup, after saving this report you may be able to schedule the summary portion of this report to be automatically generated and emailed to you by clicking ✉ (see [Emailing a Report from a Saved Setup](#) for help).



11. 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**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K	L	M
	First Name	Last Name	Job Title	Unique	Email	Site	Depart	Writer Tasks -	Writer Tasks	Writer Tasks -	Writer Tasks -	Reviewer Tasks -	Reviewer Tasks
1	Tawna	Gifford	Accounts	5	tgifford@m	Corpor	Accou	2	2	0	0	0	0
2	Tawna	Gifford	Accounts	5	tgifford@m	Corpor	Accou	2	2	0	0	0	0
3	Tawna	Gifford	Accounts	5	tgifford@m	Corpor	Accou	2	2	0	0	0	0
4	Tawna	Gifford	Accounts	5	tgifford@m	Corpor	Accou	2	2	0	0	0	0
5	Tawna	Gifford	Accounts	5	tgifford@m	Corpor	Accou	2	2	0	0	0	0
6	Tawna	Gifford	Accounts	5	tgifford@m	Corpor	Accou	2	2	0	0	0	0
7	Tawna	Gifford	Accounts	5	tgifford@m	Corpor	Accou	2	2	0	0	0	0

Report: Tasks by Document - In Draft

Important: This report has been superseded by the [Tasks by Document - Current](#) and [Tasks by Document - All Tasks](#) reports. Because this report will be removed from PolicyTech in a future release, we strongly recommend using the next-generation reports instead. See [Transitioning to Next-Generation Reports](#) for help.

Description

Shows the status of all tasks for documents or questionnaires in the draft status. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:

Document Owner, Proxy Author, Administrator, Report Manager

Sample Report:

Tasks by Document - In Draft - Incomplete

NAVEX Global
All Dates
powered by policytech

Pages: 2
Generated By: Douglas Johnson
Generated: 06/30/2014 10:58

Summary

Documents Selected	Documents with Tasks Shown	Incomplete Tasks	Average Days in Workflow Step	Maximum Days in Workflow Step
5	3	3	9	13

Documents with Tasks

[1. Account Collections Form \(v.1\)](#)
Reference # 204
Document Owner: Johnson, Douglas

<u>Status</u>	Draft	<u>Current Cycle</u>	2	<u>Document Owners</u>	1
<u>Date Last Submitted</u>	06/30/2014	<u>Current Level</u>	1	<u>Remaining</u>	1
<u>Total Days in Workflow Step</u>	0	<u>Days in Current Cycle</u>	0	<u>Total Completed</u>	0%

Incomplete Tasks (1)

Action	Date	Users	Site	Department
1. Waiting	N/A	Johnson, Douglas	Corporate Headquarters	Administration

[2. Audit Procedures \(v.1\)](#)
Reference # 206
Document Owner: Howard, Susan

<u>Status</u>	Draft	<u>Current Cycle</u>	2	<u>Document Owners</u>	1
<u>Date Last Submitted</u>	06/30/2014	<u>Current Level</u>	1	<u>Remaining</u>	1
<u>Total Days in Workflow Step</u>	0	<u>Days in Current Cycle</u>	0	<u>Total Completed</u>	0%

Incomplete Tasks (1)

Action	Date	Users	Site	Department
1. Waiting	N/A	Howard, Susan	Corporate Headquarters	Administration

<u>Status</u>	Draft	<u>Current Cycle</u>	2	<u>Document Owners</u>	1
<u>Date Last Submitted</u>	06/30/2014	<u>Current Level</u>	1	<u>Remaining</u>	1
<u>Total Days in Workflow Step</u>	13	<u>Days in Current Cycle</u>	0	<u>Total Completed</u>	0%

Incomplete Tasks (1)

1/2

How to Generate

1. Click **Reports**.
2. Click **Superseded Reports**, and then click **In Draft (Tasks by Document)**.
3. Select documents or questionnaires to include in the report (see [Selecting Documents](#) for help), and then click **OK**.

Documents

Content Type

Documents

Site

Corporate Headquarters

Select By

Title

Title

Type here to search by title.

Available Documents

Select a document by typing a Title/Reference Number above or changing the Select By criteria.

Selected Documents

Shift+Click selects a span of checkboxes.

Add Filter(s)

Clear Filter(s)

OK

All options available for this report are displayed on the left. Notice that the number of currently selected documents/questionnaires is displayed after the **Documents** option, which you can click anytime to change your document/questionnaire selection.

Note: If you change your document/questionnaire selection after clicking **View Report**, click **View Report** again to refresh the report contents.

TASKS BY DOCUMENT - IN DRAFT

Documents

100

Arrangement

Detail Options

Output Format

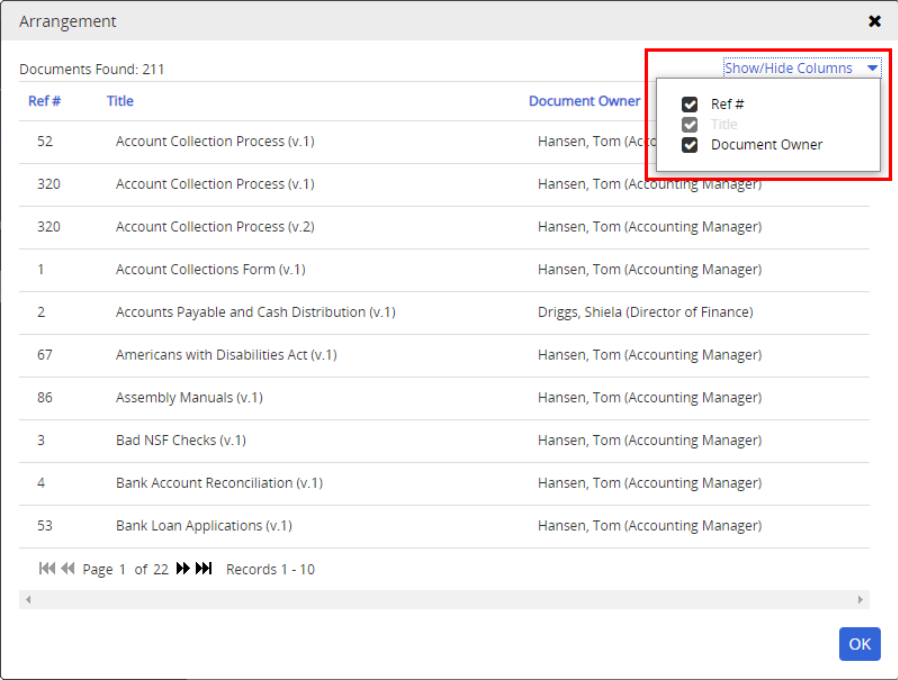
View Report

Please choose options on the left, then click View Report.

NAVEX GLOBAL

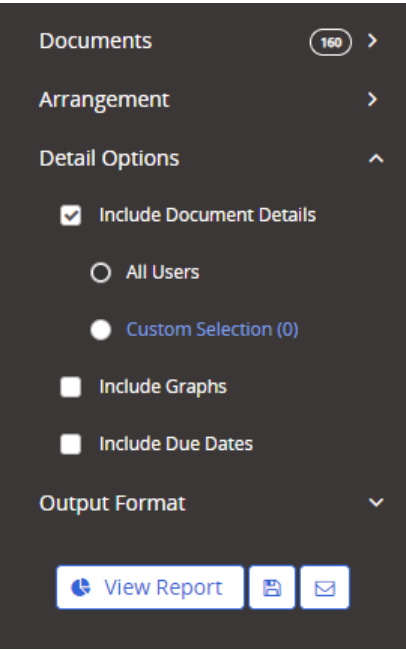
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4. (Optional) Click **Arrangement** and do any of the following:
- To change the default report columns, click **Show/Hide Columns**, and then click to clear a check box.



- 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. (Optional) Click **Detail Options**, and then select any of the following:



- **Include Document Details:** Shows the tasks associated with each document or questionnaire in the report.

Documents with Tasks

1. Cash Receipts (v.1)		Reference # 7		Document Owner: Hansen, Tom	
Status	In Draft	Current Cycle	1	Reviewers	3
Date Last Submitted	04/04/2013	Current Level	1	Remaining	2
Total Days in Workflow Step	0	Days in Current Cycle	0	Total Complete	33%

Incomplete Tasks (2)

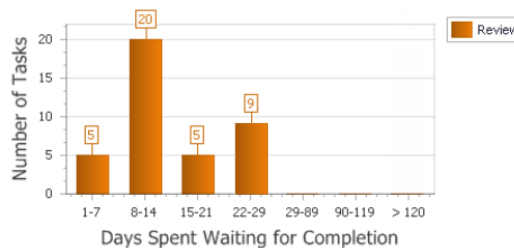
	<u>Action</u>	<u>Date</u>	<u>Users</u>	<u>Site</u>	<u>Department</u>
1.	Waiting	N/A	Benton, Carol	Corporate Headquarters	Environmental Services
2.	Waiting	N/A	Driggs, Shiela	Corporate Headquarters	Fiscal Services

With **Include Document Details** selected, you have the option to limit the documents or questionnaires included in the report to only those with tasks assigned to specific users. Click **Custom Selection**, and then select users in the same way as you would for a user-based report (see [Selecting Users](#) for help).

- **Include Graphs:** Adds a graph to the report's **Summary** area. The graph shows the number of days that tasks for the selected documents/questionnaires have been waiting for completion.

Summary

Documents Selected	Documents with Tasks Shown	Incomplete Tasks	Average Days in Workflow Step	Maximum Days in Workflow Step
12	12	23	9	23



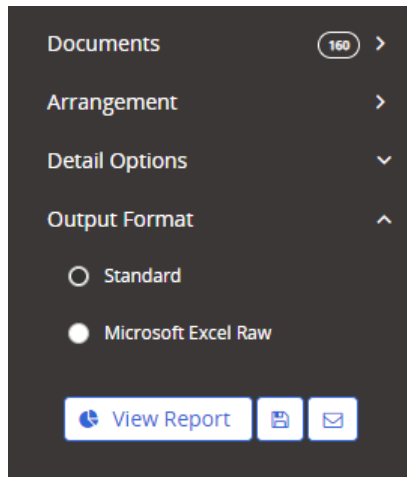
- **Include Due Dates:** Adds a **Due Date** column to the task details.


Important: This option applies only if the **Include Document Details** option is selected.

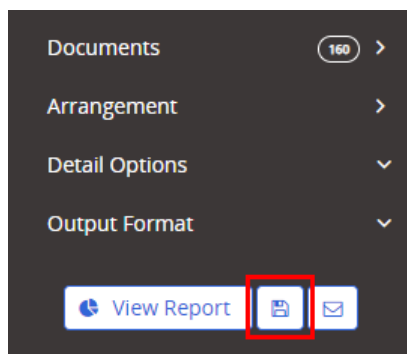
Incomplete Tasks (2)

	<u>Action</u>	<u>Date</u>	<u>Due Date</u>	<u>Users</u>	<u>Site</u>	<u>Department</u>
1.	Waiting	N/A	04/01/2013	Benton, Carol	Corporate Headquarters	Environmental Services
2.	Waiting	N/A	04/01/2013	Driggs, Shiela	Corporate Headquarters	Fiscal Services


6. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.

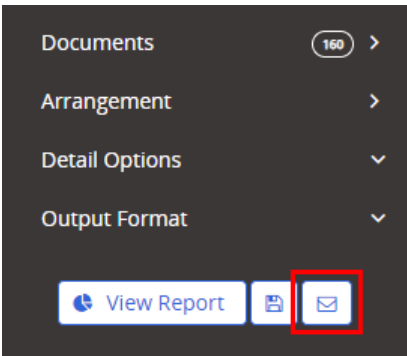


7. (Optional) To save the current document/questionnaire selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



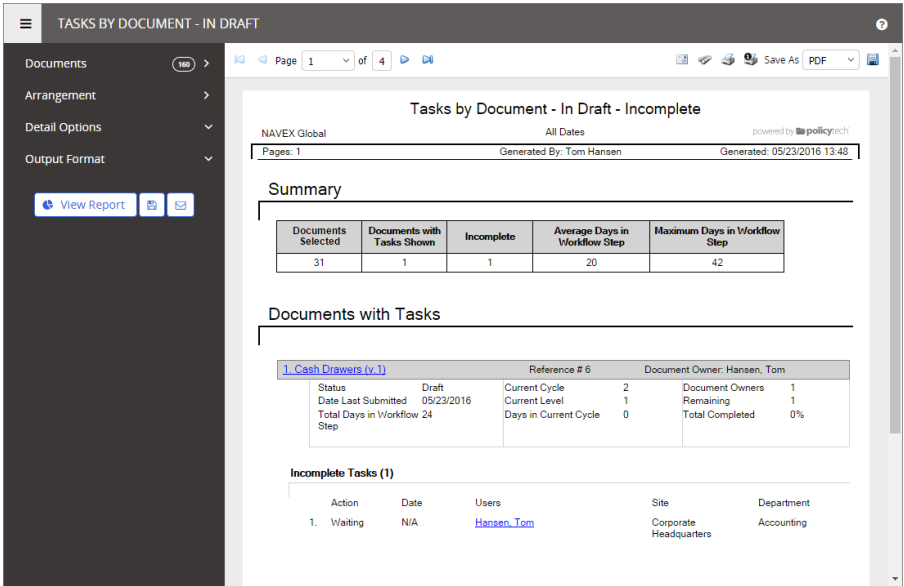
Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

8. (Optional and conditional) Depending on your assigned permissions and email setup, after saving this report you may be able to schedule the summary portion of this report to be automatically generated and emailed to you by clicking  (see [Emailing a Report from a Saved Setup](#) for help).



9. 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**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
	Ref #	Title (Version)	Version Number	Document Owner First Name	Document Owner Last Name	Job Title	Site	Department	Status	Date Last Submitted	Total Days in Workflow Step	Current Cycle	Current Level	Days in Current Cycle	Assignees	Remaining Assignees	Percent Completed	Cycle Length
1																		
2	327	Bank Account	1	Tom		Acco	Corp	Accounting	Draft	09/26/2014	41	1	1	41	1	1	0%	1:1
3	206	Bank Account	1	Susan	Howard	Doc	Corp	Administrati	Draft	06/30/2014	129	2	1	129	1	1	0%	2:1
4	11	Bank Account	1	Douglas	Johnson	Chief	Corp	Administrati	Draft	06/30/2014	1476	2	1	129	1	1	0%	2:1

Report: Tasks by Document - In Collaboration

Important: This report has been superseded by the [Tasks by Document - Current](#) and [Tasks by Document - All Tasks](#) reports. Because this report will be removed from PolicyTech in a future release, we strongly recommend using the next-generation reports instead. See [Transitioning to Next-Generation Reports](#) for help.

Description

Shows the status of all tasks for documents or questionnaires in the collaboration status. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:

Document Owner, Proxy Author, Administrator, Report Manager

Sample Report:

Tasks by Document - In Collaboration - Incomplete

NAVEX Global
All Dates
powered by policytech

Pages: 2
Generated By: Douglas Johnson
Generated: 06/30/2014 12:10

Summary

Documents Selected	Documents with Tasks Shown	Incomplete Tasks	Average Days in Workflow Step	Maximum Days in Workflow Step
3	3	3	5	12

Documents with Tasks

[1. Capitalization \(v.1\)](#)
Reference # 5
Document Owner: Hansen, Tom

<u>Status</u>	Draft	<u>Current Cycle</u>	1	<u>Writers</u>	1
<u>Date Last Submitted</u>	06/30/2014	<u>Current Level</u>	1	<u>Remaining</u>	1
<u>Total Days in Workflow Step</u>	12	<u>Days in Current Cycle</u>	12	<u>Total Completed</u>	0%

Incomplete Tasks (1)

Action	Date	Users	Site	Department
1. Waiting	N/A	Gifford, Tawna	Corporate Headquarters	Accounting

[2. Cash Receipts \(v.1\)](#)
Reference # 7
Document Owner: Hansen, Tom

<u>Status</u>	Draft	<u>Current Cycle</u>	1	<u>Writers</u>	1
<u>Date Last Submitted</u>	06/30/2014	<u>Current Level</u>	1	<u>Remaining</u>	1
<u>Total Days in Workflow Step</u>	2	<u>Days in Current Cycle</u>	2	<u>Total Completed</u>	0%

Incomplete Tasks (1)

Action	Date	Users	Site	Department
1. Waiting	N/A	Gifford, Tawna	Corporate Headquarters	Accounting

[3. Invoice Billings \(v.1\)](#)
Reference # 12
Document Owner: Hansen, Tom

<u>Status</u>	Draft	<u>Current Cycle</u>	1	<u>Writers</u>	1
<u>Date Last Submitted</u>	06/30/2014	<u>Current Level</u>	1	<u>Remaining</u>	1
<u>Total Days in Workflow Step</u>	1	<u>Days in Current Cycle</u>	1	<u>Total Completed</u>	0%

1/2

How to Generate

1. Click **Reports**.
2. Click **Superseded Reports**, and then click **In Collaboration (Tasks by Document)**.
3. Select documents or questionnaires to include in the report (see [Selecting Documents](#) for help), and then click **OK**.

Documents

Content Type: Documents

Site: Corporate Headquarters

Select By: Title

Title: Type here to search by title.

Available Documents: Select a document by typing a Title/Reference Number above or changing the Select By criteria.

Selected Documents:

Shift+Click selects a span of checkboxes.

+ Add Filter(s) X Clear Filter(s)

OK

All options available for this report are displayed on the left. Notice that the number of currently selected documents/questionnaires is displayed after the **Documents** option, which you can click anytime to change your document/questionnaire selection.

Note: If you change your document/questionnaire selection after clicking **View Report**, click **View Report** again to refresh the report contents.

TASKS BY DOCUMENT - IN COLLABORATION

Documents (2) >

Arrangement >

Detail Options >

Task Options >

Output Format >

View Report

Please choose options on the left, then click View Report.

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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.

Arrangement ✕

Documents Found: 211

Show/Hide Columns

☒ Ref #
☒ Title
☒ Document Owner

Ref #	Title	Document Owner
52	Account Collection Process (v.1)	Hansen, Tom (Accounting Manager)
320	Account Collection Process (v.1)	Hansen, Tom (Accounting Manager)
320	Account Collection Process (v.2)	Hansen, Tom (Accounting Manager)
1	Account Collections Form (v.1)	Hansen, Tom (Accounting Manager)
2	Accounts Payable and Cash Distribution (v.1)	Driggs, Shiela (Director of Finance)
67	Americans with Disabilities Act (v.1)	Hansen, Tom (Accounting Manager)
86	Assembly Manuals (v.1)	Hansen, Tom (Accounting Manager)
3	Bad NSF Checks (v.1)	Hansen, Tom (Accounting Manager)
4	Bank Account Reconciliation (v.1)	Hansen, Tom (Accounting Manager)
53	Bank Loan Applications (v.1)	Hansen, Tom (Accounting Manager)

Page 1 of 22 Records 1 - 10

OK

- 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. (Optional) Click **Detail Options**, and then select any of the following:

Documents 211 >

Arrangement >

Detail Options ^

☒ Include Document Details

☐ All Users

☒ Custom Selection (0)

☐ Include Graphs

☐ Include Due Dates

Task Options >

Output Format >

View Report

- **Include Document Details:** Shows the tasks associated with each document or questionnaire in the report.

Documents with Tasks

1. Cash Receipts (v.1)		Reference # 7		Document Owner: Hansen, Tom	
Status	Draft	Current Cycle	1	Writers	1
Date Last Submitted	06/30/2014	Current Level	1	Remaining	1
Total Days in Workflow Step	128	Days in Current Cycle	128	Total Completed	0%

Incomplete Tasks (1)

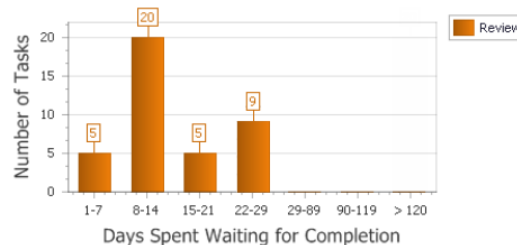
Action	Date	Users	Site	Department
1. Waiting	N/A	Gifford, Tawna	Corporate Headquarters	Accounting

With **Include Document Details** selected, you have the option to limit the documents or questionnaires included in the report to only those with tasks assigned to specific users. Click **Custom Selection**, and then select users in the same way as you would for a user-based report (see [Selecting Users](#) for help).

- **Include Graphs:** Adds a graph to the report's **Summary** area. The graph shows the number of days that tasks for the selected documents/questionnaires have been waiting for completion.

Summary

Documents Selected	Documents with Tasks Shown	Incomplete Tasks	Average Days in Workflow Step	Maximum Days in Workflow Step
12	12	23	9	23



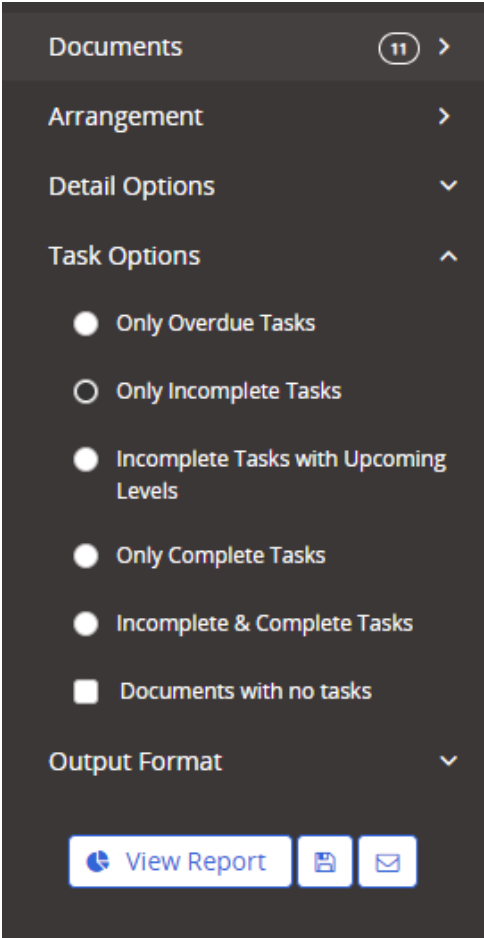
- **Include Due Dates:** Adds a **Due Date** column to the task details.

Important: This option applies only if the **Include Document Details** option is selected.

Incomplete Tasks (2)

Action	Date	Due Date	Users	Site	Department
1. Waiting	N/A	04/01/2013	Benton, Carol	Corporate Headquarters	Environmental Services
2. Waiting	N/A	04/01/2013	Driggs, Shiela	Corporate Headquarters	Fiscal Services

6. (Optional) Click **Task Options**, and then do any of the following:
- Click a single task status (overdue, incomplete, incomplete with upcoming levels, or complete) or click **Incomplete & Complete Tasks**.

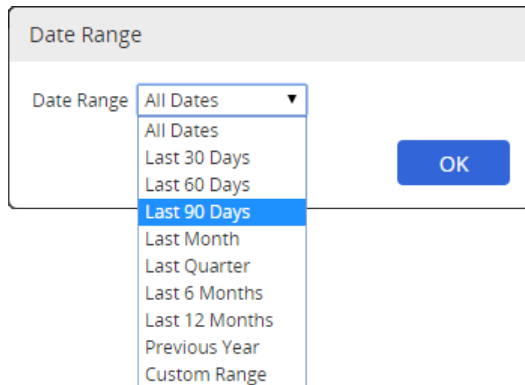


If you select **Incomplete Tasks with Upcoming Levels**, information will be shown about any writing tasks that assigned writers have not yet received notification for. These could be tasks for documents/questionnaires that have not yet reached the collaboration status or tasks for documents/questionnaires currently in collaboration but that have not yet reached a writer's assigned level.

Upcoming Tasks (1)				
Action	Date	Users	Site	Department
1. Upcoming Task	N/A	Jones, Anne	Corporate Headquarters	Administration

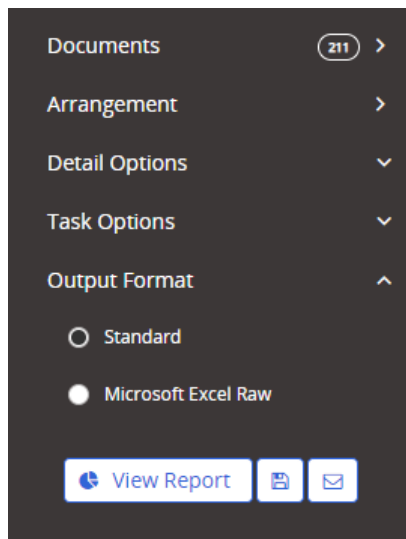
- If you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, the **Date** option appears. To show only the selected tasks that fall within a certain date range, click **Date**, select a date range, and then


click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.

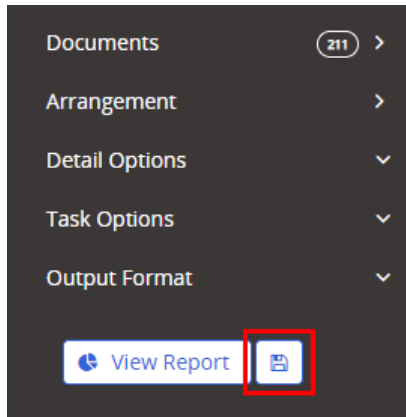
A dialog box titled "Date Range" with a dropdown menu labeled "Date Range" showing a list of options: "All Dates", "Last 30 Days", "Last 60 Days", "Last 90 Days" (highlighted), "Last Month", "Last Quarter", "Last 6 Months", "Last 12 Months", "Previous Year", and "Custom Range". An "OK" button is located to the right of the dropdown.

- By default, only the documents/questionnaires from those you selected that have tasks matching the current **Task Options** filters are included in the report. To include all selected documents/questionnaires in the report, even those without matching tasks, select the **Include documents without tasks** check box.

7. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.

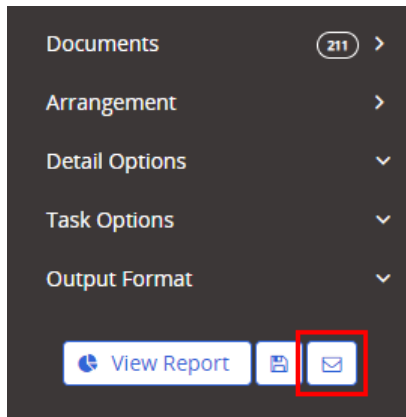
A dark-themed dialog box with a list of settings: "Documents" (211), "Arrangement", "Detail Options", "Task Options", and "Output Format" (expanded). Under "Output Format", there are two radio buttons: "Standard" (unselected) and "Microsoft Excel Raw" (selected). At the bottom are three buttons: "View Report" (with a magnifying glass icon), a save icon, and an email icon.

8. (Optional) To save the current document/questionnaire selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

9. (Optional and conditional) Depending on your assigned permissions and email setup, after saving this report you may be able to schedule the summary portion of this report to be automatically generated and emailed to you by clicking ✉ (see [Emailing a Report from a Saved Setup](#) for help).



10. 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.

Tasks by Document - In Collaboration

Documents
Arrangement
Detail Options
Task Options
Output Format
Standard
Microsoft Excel Raw
View Report

Page 1 of 1

Tasks by Document - In Collaboration - Incomplete

NAVEX Global All Dates Generated By: Douglas Johnson Generated: 05/24/2016 12:13

Summary

Documents Selected	Documents with Tasks Shown	Incomplete	Average Days in Workflow Step	Maximum Days in Workflow Step
8	8	15	17	19

Documents with Tasks

1. Bank Account Reconciliation (v.1) Reference # 4 Document Owner: Hansen, Tom

Status	Date Last Submitted	Current Cycle	Current Level	Days in Current Cycle	Writers	Remaining	Total Completed
Draft	02/26/2016	2	1	8	2	1	50%

Incomplete Tasks (1)

Action	Date	Users	Site	Department
1. Waiting	N/A	Breen, Darren	Corporate Headquarters	Human Resources

2. Invoice Billings (v.1) Reference # 194 Document Owner: Accounting, DocOwner

Status	Date Last Submitted	Current Cycle	Current Level	Days in Current Cycle	Writers	Remaining	Total Completed
Draft	06/30/2014	1	1	128	2	1	0%

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
	Ref #	Title (Version)	Version Number	Document Owner First Name	Document Owner Last Name	Job Title	Site	Department	Status	Date Last Submitted	Total Days in Workflow Step	Current Cycle	Current Level	Days in Current Cycle	Writers	Remaining Writers	Percent Completed
2	7	Cash Receipts	1	Tom	Hansen	Accol	Corpo	Accounting	Draft	06/30/2014	128	1	1	128	2	1	0%
3	7	Cash Receipts	1	Tom	Hansen	Accol	Corpo	Accounting	Draft	06/30/2014	128	1	1	128	2	1	0%

Report: Tasks by Document - In Review

Important: This report has been superseded by the [Tasks by Document - Current](#) and [Tasks by Document - All Tasks](#) reports. Because this report will be removed from PolicyTech in a future release, we strongly recommend using the next-generation reports instead. See [Transitioning to Next-Generation Reports](#) for help.

Description

Shows the status of all tasks for documents or questionnaires in the review status. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:

Document Owner, Proxy Author, Administrator, Report Manager

Sample Report:

Tasks by Document - In Review - Incomplete

NAVEX Global
All Dates
powered by policytech

Pages: 2
Generated By: Douglas Johnson
Generated: 06/30/2014 12:29

Summary

Documents Selected	Documents with Tasks Shown	Incomplete Tasks	Average Days in Workflow Step	Maximum Days in Workflow Step
3	3	3	8	13

Documents with Tasks

1. Capitalization (v.1)

Reference # 5
Document Owner: Hansen, Tom

<u>Status</u>	In Review	<u>Current Cycle</u>	1	<u>Reviewers</u>	2
<u>Date Last Submitted</u>	06/30/2014	<u>Current Level</u>	1	<u>Remaining</u>	1
<u>Total Days in Workflow Step</u>	9	<u>Days in Current Cycle</u>	9	<u>Total Completed</u>	50%

Incomplete Tasks (1)

Action	Date	Users	Site	Department
1. Waiting	N/A	Benton, Carol	Corporate Headquarters	Environmental Services

2. Cash Receipts (v.1)

Reference # 207
Document Owner: Breen, Darren

<u>Status</u>	In Review	<u>Current Cycle</u>	1	<u>Reviewers</u>	2
<u>Date Last Submitted</u>	11/17/2010	<u>Current Level</u>	1	<u>Remaining</u>	2
<u>Total Days in Workflow Step</u>	13	<u>Days in Current Cycle</u>	13	<u>Total Completed</u>	0%

Incomplete Tasks (2)

Action	Date	Users	Site	Department
1. Waiting	N/A	Benton, Carol	Corporate Headquarters	Environmental Services
2. Waiting	N/A	Hansen, Tom	Corporate Headquarters	Accounting

3. Year End Closing (v.1)

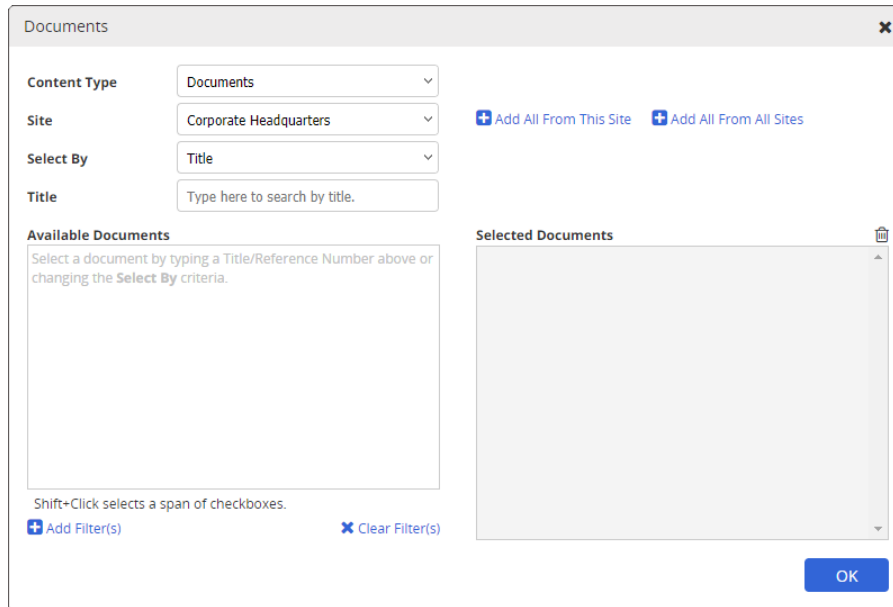
Reference # 205
Document Owner: Driggs, Shiela

<u>Status</u>	In Review	<u>Current Cycle</u>	1	<u>Reviewers</u>	4
<u>Date Last Submitted</u>	11/17/2010	<u>Current Level</u>	1	<u>Remaining</u>	2
<u>Total Days in Workflow Step</u>	2	<u>Days in Current Cycle</u>	2	<u>Total Completed</u>	50%

1/2

How to Generate

1. Click **Reports**.
2. Click **Superseded Documents**, and then click **In Review (Tasks by Document)**.
3. Select documents or questionnaires to include in the report (see [Selecting Documents](#) for help), and then click **OK**.



Documents

Content Type: Documents

Site: Corporate Headquarters

Select By: Title

Title: Type here to search by title.

Available Documents: Select a document by typing a Title/Reference Number above or changing the Select By criteria.

Selected Documents:

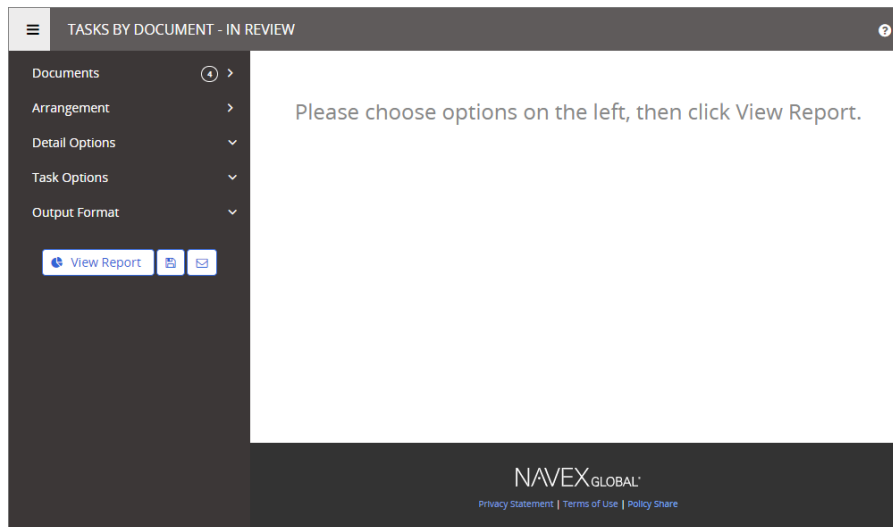
Shift+Click selects a span of checkboxes.

+ Add Filter(s) X Clear Filter(s)

OK

All options available for this report are displayed on the left. Notice that the number of currently selected documents/questionnaires is displayed after the **Documents** option, which you can click anytime to change your document/questionnaire selection.

Note: If you change your document/questionnaire selection after clicking **View Report**, click **View Report** again to refresh the report contents.



TASKS BY DOCUMENT - IN REVIEW

Documents

Arrangement

Detail Options

Task Options

Output Format

View Report Print Email

Please choose options on the left, then click View Report.

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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.

Arrangement

Documents Found: 211

Ref #	Title	Document Owner
52	Account Collection Process (v.1)	Hansen, Tom (Accounting Manager)
320	Account Collection Process (v.1)	Hansen, Tom (Accounting Manager)
320	Account Collection Process (v.2)	Hansen, Tom (Accounting Manager)
1	Account Collections Form (v.1)	Hansen, Tom (Accounting Manager)
2	Accounts Payable and Cash Distribution (v.1)	Driggs, Shiela (Director of Finance)
67	Americans with Disabilities Act (v.1)	Hansen, Tom (Accounting Manager)
86	Assembly Manuals (v.1)	Hansen, Tom (Accounting Manager)
3	Bad NSF Checks (v.1)	Hansen, Tom (Accounting Manager)
4	Bank Account Reconciliation (v.1)	Hansen, Tom (Accounting Manager)
53	Bank Loan Applications (v.1)	Hansen, Tom (Accounting Manager)

Page 1 of 22Records 1 - 10

OK

- 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. (Optional) Click **Detail Options**, and then select any of the following:

Documents

Arrangement

Detail Options

☒ Include Document Details

☐ All Users

☒ Custom Selection (0)

☐ Include Graphs

☐ Include Due Dates

Task Options

Output Format

View Report

- **Include Document Details:** Shows the tasks associated with each document or questionnaire in the report.

Documents with Tasks

1. Cash Receipts (v.1)		Reference # 7		Document Owner: Hansen, Tom	
<u>Status</u>	In Review	<u>Current Cycle</u>	1	<u>Reviewers</u>	3
<u>Date Last Submitted</u>	04/04/2013	<u>Current Level</u>	1	<u>Remaining</u>	2
<u>Total Days in Workflow Step</u>	0	<u>Days in Current Cycle</u>	0	<u>Total Complete</u>	33%

Incomplete Tasks (2)

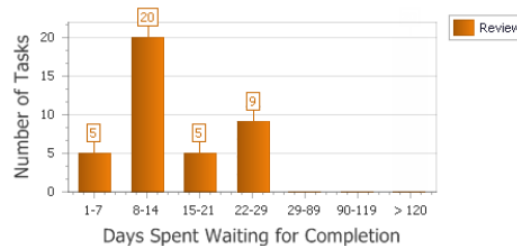
	<u>Action</u>	<u>Date</u>	<u>Users</u>	<u>Site</u>	<u>Department</u>
1.	Waiting	N/A	Benton, Carol	Corporate Headquarters	Environmental Services
2.	Waiting	N/A	Driggs, Shiela	Corporate Headquarters	Fiscal Services

With **Include Document Details** selected, you have the option to limit the documents or questionnaires included in the report to only those with tasks assigned to specific users. Click **Custom Selection**, and then select users in the same way as you would for a user-based report (see [Selecting Users](#) for help).

- **Include Graphs:** Adds a graph to the report's **Summary** area. The graph shows the number of days that tasks for the selected documents/questionnaires have been waiting for completion.

Summary

Documents Selected	Documents with Tasks Shown	Incomplete Tasks	Average Days in Workflow Step	Maximum Days in Workflow Step
12	12	23	9	23



- **Include Due Dates:** Adds a **Due Date** column to the task details.

Important: This option applies only if the **Include Document Details** option is selected.

Incomplete Tasks (2)

	<u>Action</u>	<u>Date</u>	<u>Due Date</u>	<u>Users</u>	<u>Site</u>	<u>Department</u>
1.	Waiting	N/A	04/01/2013	Benton, Carol	Corporate Headquarters	Environmental Services
2.	Waiting	N/A	04/01/2013	Driggs, Shiela	Corporate Headquarters	Fiscal Services

6. (Optional) Click **Task Options**, and then do any of the following:
- Click a single task status (overdue, incomplete, incomplete with upcoming levels, or complete) or click **Incomplete & Complete Tasks**.

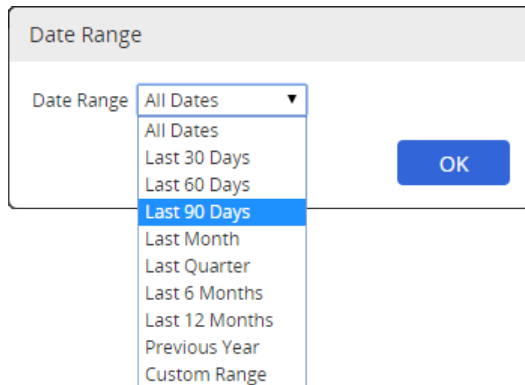
The screenshot shows a dark-themed sidebar menu. At the top, 'Documents' has a notification badge with the number '4'. Below it are 'Arrangement', 'Detail Options', and 'Task Options' (which is expanded). The 'Task Options' section contains several radio button options: 'Only Overdue Tasks', 'Only Incomplete Tasks', 'Incomplete Tasks with Upcoming Levels' (which is selected), 'Only Complete Tasks', 'Incomplete & Complete Tasks', and 'Documents with no tasks' (which is a checkbox option). Below these is an 'Output Format' dropdown menu. At the bottom of the sidebar are three buttons: 'View Report' (with a clock icon), a save icon, and an email icon.

If you select **Incomplete Tasks with Upcoming Levels**, information will be shown about any tasks that assigned reviewers have not yet received notification for. These could be tasks for documents/questionnaires that have not yet reached the reviewer status or tasks for documents/questionnaires currently in review but that have not yet reached a reviewer's assigned level.

Upcoming Tasks (1)				
Action	Date	Users	Site	Department
1. Upcoming Task	N/A	Jones, Anne	Corporate Headquarters	Administration

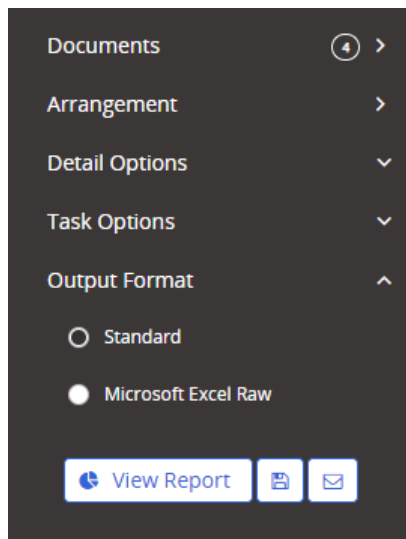
- If you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, the **Date** option appears. To show only the selected tasks that fall within a certain date range, click **Date**, select a date range, and then


click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.

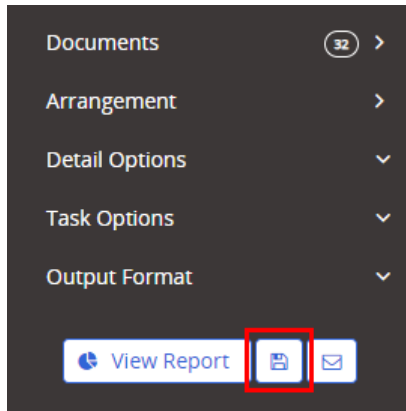
A dialog box titled "Date Range" with a dropdown menu labeled "Date Range" showing a list of options: "All Dates", "Last 30 Days", "Last 60 Days", "Last 90 Days" (highlighted), "Last Month", "Last Quarter", "Last 6 Months", "Last 12 Months", "Previous Year", and "Custom Range". An "OK" button is located to the right of the dropdown.

- By default, only the documents/questionnaires from those you selected that have tasks matching the current **Task Options** filters are included in the report. To include all selected documents/questionnaires in the report, even those without matching tasks, select the **Include documents without tasks** check box.


7. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.

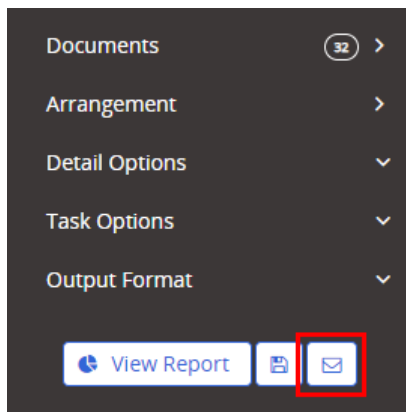
A dialog box titled "Output Format" with a list of options: "Standard" (selected with a radio button) and "Microsoft Excel Raw" (unselected with a radio button). At the bottom, there are three buttons: "View Report" (with a magnifying glass icon), a save icon, and an email icon.

8. (Optional) To save the current document/questionnaire selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

9. (Optional and conditional) Depending on your assigned permissions and email setup, after saving this report you may be able to schedule the summary portion of this report to be automatically generated and emailed to you by clicking  (see [Emailing a Report from a Saved Setup](#) for help).



10. 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.

Tasks by Document - IN REVIEW

Documents
Arrangement
Detail Options
Task Options
Output Format

View Report

Page 1 of 2

Tasks by Document - In Review - Incomplete

NAVEX Global All Dates Generated By: Tom Hansen Generated: 05/24/2016 12:54

Summary

Documents Selected	Documents with Tasks Shown	Incomplete	Average Days in Workflow Step	Maximum Days in Workflow Step
7	7	11	20	25

Documents with Tasks

1. Bank Account Reconciliation (v.1) Reference # 204 Document Owner: Hansen, Tom

Status	In Review	Current Cycle	Reviewers
Date Last Submitted	11/17/2015	1	2
Total Days in Workflow Step	20	Days in Current Cycle	20
		Remaining	2
		Total Completed	0%

Incomplete Tasks (2)

Action	Date	Overdue	Users	Site	Department
1. Waiting	N/A	N/A	Lopez, Anna	Corporate Headquarters	Accounting
2. Waiting	N/A	N/A	Chin, Joey	Corporate Headquarters	Technical Services

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
	Ref #	Title (Version)	Version Number	Document Owner Unique ID	Document Owner First Name	Docu Owner Last Name	Job Title	Site	Department	Status	Date Last Submitted	Total Days in Workflow Step	Current Cycle	Current Level	Days in Current Cycle	Reviewers	Remaining Reviewers	Percent Complete	
1																			
2	262	Email Privacy Po	2	tallison	Todd	Allison	Tester	Corpor	Quality Assu In Revie	2015/12/16	15	1	1	1	15	4	4	0%	
3	262	Email Privacy Po	2	tallison	Todd	Allison	Tester	Corpor	Quality Assu In Revie	2015/12/16	15	1	1	1	15	4	4	0%	
4	262	Email Privacy Po	2	tallison	Todd	Allison	Tester	Corpor	Quality Assu In Revie	2015/12/16	15	1	1	1	15	4	4	0%	
5	262	Email Privacy Po	2	tallison	Todd	Allison	Tester	Corpor	Quality Assu In Revie	2015/12/16	15	1	1	1	15	4	4	0%	

Report: Tasks by Document - In Approval

Important: This report has been superseded by the [Tasks by Document - Current](#) and [Tasks by Document - All Tasks](#) reports. Because this report will be removed from PolicyTech in a future release, we strongly recommend using the next-generation reports instead. See [Transitioning to Next-Generation Reports](#) for help.

Description

Shows the status of all tasks for documents or questionnaires in the approval status. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:

Document Owner, Proxy Author, Administrator, Report Manager

Sample Report:

Tasks by Document - In Published - Incomplete

NAVEX Global
All Dates
powered by policytech

Pages: 2
Generated By: Douglas Johnson
Generated: 06/30/2014 13:39

Summary

Documents Selected	Documents with Tasks Shown	Incomplete Tasks	Average Days in Workflow Step	Maximum Days in Workflow Step
3	3	3	9	14

Documents with Tasks

1. Capitalization (v.1)

Reference # 5
Document Owner: Hansen, Tom

<u>Status</u>	Approved	<u>Current Cycle</u>	1	<u>Readers</u>	4
<u>Date Last Submitted</u>	06/30/2014	<u>Current Level</u>	1	<u>Remaining</u>	1
<u>Total Days in Workflow Step</u>	5	<u>Days in Current Cycle</u>	5	<u>Total Completed</u>	75%

Incomplete Tasks (1)

Action	Date	Users	Site	Department
1. Incomplete	N/A	Cash, Jordan	Corporate Headquarters	Accounting

2. Cash Receipts (v.1)

Reference # 207
Document Owner: Breen, Darren

<u>Status</u>	Approved	<u>Current Cycle</u>	1	<u>Readers</u>	4
<u>Date Last Submitted</u>	06/30/2014	<u>Current Level</u>	1	<u>Remaining</u>	1
<u>Total Days in Workflow Step</u>	14	<u>Days in Current Cycle</u>	14	<u>Total Completed</u>	75%

Incomplete Tasks (1)

Action	Date	Users	Site	Department
1. Incomplete	N/A	Cash, Jordan	Corporate Headquarters	Accounting

3. Year End Closing (v.1)

Reference # 205
Document Owner: Driggs, Shiela

<u>Status</u>	Approved	<u>Current Cycle</u>	1	<u>Readers</u>	4
<u>Date Last Submitted</u>	06/30/2014	<u>Current Level</u>	1	<u>Remaining</u>	2
<u>Total Days in Workflow Step</u>	8	<u>Days in Current Cycle</u>	8	<u>Total Completed</u>	50%

1/2

How to Generate

1. Click **Reports**.
2. Click **Superseded Reports**, and then click **In Approval (Tasks by Document)**.
3. Select documents or questionnaires to include in the report (see [Selecting Documents](#) for help), and then click **OK**.

Documents

Content Type: Documents

Site: Corporate Headquarters

Select By: Title

Title: Type here to search by title.

Available Documents: Select a document by typing a Title/Reference Number above or changing the Select By criteria.

Selected Documents:

Shift+Click selects a span of checkboxes.

+ Add Filter(s) X Clear Filter(s)

OK

All options available for this report are displayed on the left. Notice that the number of currently selected documents/questionnaires is displayed after the **Documents** option, which you can click anytime to change your document/questionnaire selection.

Note: If you change your document/questionnaire selection after clicking **View Report**, click **View Report** again to refresh the report contents.

TASKS BY DOCUMENT - IN APPROVAL

Documents (11) >

Arrangement >

Detail Options >

Task Options >

Output Format >

View Report

Please choose options on the left, then click View Report.

NAVEX GLOBAL[®]

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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.

Arrangement

Documents Found: 211

Show/Hide Columns

☒ Ref #

☒ Title

☒ Document Owner

Ref #	Title	Document Owner
52	Account Collection Process (v.1)	Hansen, Tom (Accounting Manager)
320	Account Collection Process (v.1)	Hansen, Tom (Accounting Manager)
320	Account Collection Process (v.2)	Hansen, Tom (Accounting Manager)
1	Account Collections Form (v.1)	Hansen, Tom (Accounting Manager)
2	Accounts Payable and Cash Distribution (v.1)	Driggs, Shiela (Director of Finance)
67	Americans with Disabilities Act (v.1)	Hansen, Tom (Accounting Manager)
86	Assembly Manuals (v.1)	Hansen, Tom (Accounting Manager)
3	Bad NSF Checks (v.1)	Hansen, Tom (Accounting Manager)
4	Bank Account Reconciliation (v.1)	Hansen, Tom (Accounting Manager)
53	Bank Loan Applications (v.1)	Hansen, Tom (Accounting Manager)

Page 1 of 22Records 1 - 10

OK

- 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. (Optional) Click **Detail Options**, and then select any of the following:

Documents211

Arrangement

Detail Options

☒ Include Document Details

☐ All Users

☒ Custom Selection (0)

☐ Include Graphs

☐ Include Due Dates

Task Options

Output Format

View Report

- **Include Document Details:** Shows the tasks associated with each document or questionnaire in the report.

Documents with Tasks

1. Account Collections Form (v.2)		Reference # 216		Document Owner: Accounting, DocOwner	
Status	In Approval	Current Cycle	1	Approvers	2
Date Last Submitted	03/15/2014	Current Level	1	Remaining	2
Total Days in Workflow Step	13	Days in Current Cycle	13	Total Completed	0%

Incomplete Tasks (2)

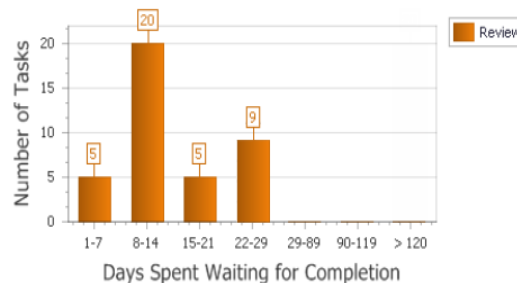
Action	Date	Users	Site	Department
1. Waiting	N/A	Barnett, John	Corporate Headquarters	Fiscal Services
2. Waiting	N/A	Tester, Task	Corporate Headquarters	Technical Services

With **Include Document Details** selected, you have the option to limit the documents or questionnaires included in the report to only those with tasks assigned to specific users. Click **Custom Selection**, and then select users in the same way as you would for a user-based report (see [Selecting Users](#) for help).

- **Include Graphs:** Adds a graph to the report's **Summary** area. The graph shows the number of days that tasks for the selected documents/questionnaires have been waiting for completion.

Summary

Documents Selected	Documents with Tasks Shown	Incomplete Tasks	Average Days in Workflow Step	Maximum Days in Workflow Step
12	12	23	9	23

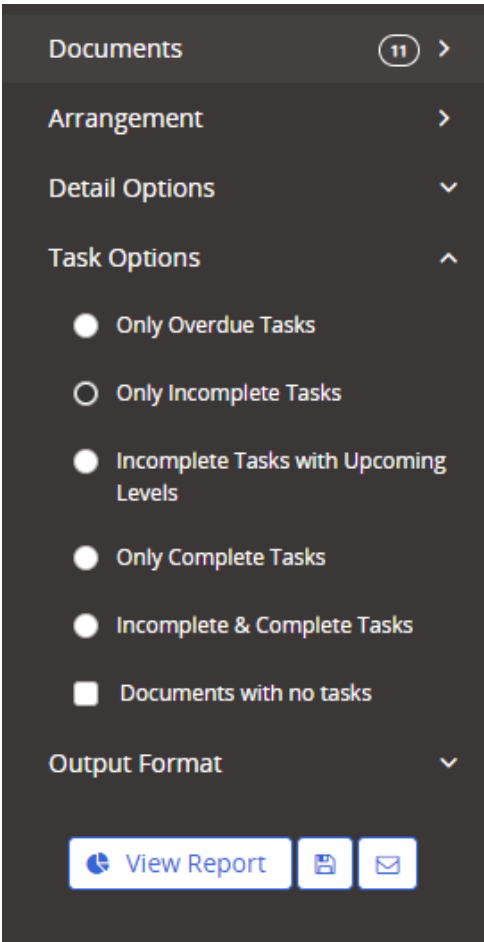


- **Include Due Dates:** Adds a **Due Date** column to the task details.

Important: This option applies only if the **Include Document Details** option is selected.

Incomplete Tasks (2)						
	Action	Date	Due Date	Users	Site	Department
1.	Waiting	N/A	04/01/2013	Benton, Carol	Corporate Headquarters	Environmental Services
2.	Waiting	N/A	04/01/2013	Driggs, Shiela	Corporate Headquarters	Fiscal Services

6. (Optional) Click **Task Options**, and then do any of the following:
- Click a single task status (overdue, incomplete, incomplete with upcoming levels, or complete) or click **Incomplete & Complete Tasks**.



If you select **Incomplete Tasks with Upcoming Levels**, information will be shown about any tasks that assigned approvers have not yet received notification for. These could be tasks for documents/questionnaires that have not yet reached the approver status or tasks for documents/questionnaires currently in approval but that have not yet reached an approver's assigned level.

Upcoming Tasks (1)				
Action	Date	Users	Site	Department
1. Upcoming Task	N/A	Jones, Anne	Corporate Headquarters	Administration

- If you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, the **Date** option appears. To show only the selected tasks that fall within a certain date range, click **Date**, select a date range, and then click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.

Date Range

Date Range

All Dates

All Dates

Last 30 Days

Last 60 Days

Last 90 Days

Last Month

Last Quarter

Last 6 Months

Last 12 Months

Previous Year

Custom Range

OK

- By default, only the documents/questionnaires from those you selected that have tasks matching the current **Task Options** filters are included in the report. To include all selected documents/questionnaires in the report, even those without matching tasks, select the **Include documents without tasks** check box.
7. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.

Documents211>

Arrangement>

Detail Optionsv


Task Optionsv

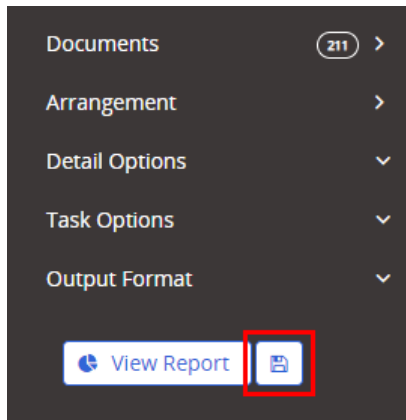
Output Format^

Standard


Microsoft Excel Raw

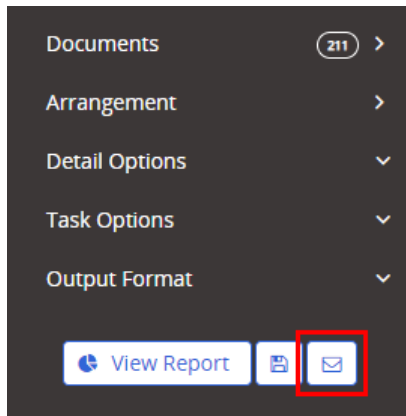
View Report

8. (Optional) To save the current document/questionnaire selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

9. (Optional and conditional) Depending on your assigned permissions and email setup, after saving this report you may be able to schedule the summary portion of this report to be automatically generated and emailed to you by clicking  (see [Emailing a Report from a Saved Setup](#) for help).



10. 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.

TASKS BY DOCUMENT - IN APPROVAL

Documents **11** > Page 1 of 4 Save As PDF

Tasks by Document - In Approval - Incomplete (powered by PolicyTech)

NAVEX Global All Dates
Pages: 4 Generated By: Douglas Johnson Generated: 05/24/2016 13:41

Summary

Documents Selected	Documents with Tasks Shown	Incomplete	Average Days in Workflow Step	Maximum Days in Workflow Step
10	10	22	11	19

Documents with Tasks

[1 Ap. Accept \(v 2\)](#) Reference # 216 Document Owner: Lopez, Anna

Status	In Approval	Current Cycle	1	Approvers	2
Date Last Submitted	03/15/2016	Current Level	1	Remaining	2
Total Days in Workflow Step	18	Days in Current Cycle	1	Total Completed	0%

Incomplete Tasks (2)

Action	Date	Users	Site	Department
1. Waiting	N/A	Lopez, Anna	Corporate Headquarters	Accounting
2. Waiting	N/A	Chin, Joey	Corporate Headquarters	Technical Services

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
	Ref. #	Title (Version)	Version Number	Document Owner Unique ID	Document Owner First Name	Document Owner Last Name	Job Title	Site	Department	Status	Date Last Submitted	Total Days in Workflow Step	Current Cycle	Current Level	Days in Current Cycle	Approvers	Remaining Approvers	Percent Complete	
1																			
2	262	Email Privacy f	2	tallison	Todd	Allison	Teste Corp Quality Ass	In Appri	3/20/2015		27	1	1	1	14	4	4	0%	
3	262	Email Privacy f	2	tallison	Todd	Allison	Teste Corp Quality Ass	In Appri	3/20/2015		27	1	1	1	14	4	4	0%	
4	262	Email Privacy f	2	tallison	Todd	Allison	Teste Corp Quality Ass	In Appri	3/20/2015		27	1	1	1	14	4	4	0%	
5	262	Email Privacy f	2	tallison	Todd	Allison	Teste Corp Quality Ass	In Appri	3/20/2015		27	1	1	1	14	4	4	0%	

Report: Tasks by Document - In Published

Important: This report has been superseded by the [Tasks by Document - Current](#) and [Tasks by Document - All Tasks](#) reports. Because this report will be removed from PolicyTech in a future release, we strongly recommend using the next-generation reports instead. See [Transitioning to Next-Generation Reports](#) for help.

Description


Shows the status of all tasks for documents or questionnaires in the published status. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:

Document Owner, Proxy Author, Administrator, Report Manager

Sample Report:

Tasks by Document - In Published - Incomplete

Demo Site All Dates powered by  policytech

Pages: 9 Generated By: Douglas Johnson Generated: 10/28/2013 3:37 PM

Summary

Documents Selected	Documents with Tasks Shown	Incomplete Tasks	Average Days in Workflow Step	Maximum Days in Workflow Step
8	6	10	18	45

Documents with Tasks

1. Bank Account Reconciliation (v.4)		Reference # 4	Document Owner: Hansen, Tom	
Status	Approved	Current Cycle	1	Readers
Date Last Submitted	08/08/2013	Current Level	1	Remaining
Total Days in Workflow Step	7	Days in Current Cycle	8	Total Completed
				0%

Incomplete Tasks (14)

Action	Date	Users	Site	Department
1. Incomplete	N/A	Hansen, Tom	Corporate Headquarters	Accounting
2. Incomplete	N/A	Aguiar, Janice	Corporate Headquarters	Administration
3. Incomplete	N/A	Johnson, Douglas	Corporate Headquarters	Administration
4. Incomplete	N/A	Jones, Anne	Corporate Headquarters	Administration
5. Incomplete	N/A	Monson, Teresa	Corporate Headquarters	Administration
6. Incomplete	N/A	Potts, Tony	Corporate Headquarters	Administration
7. Incomplete	N/A	Smiles, LaNae	Corporate Headquarters	Administration
8. Incomplete	N/A	Steiner, Mark	Corporate Headquarters	Administration
9. Incomplete	N/A	Cash, Jordon	Corporate Headquarters	Accounting
10. Incomplete	N/A	Hill, Maria	Corporate Headquarters	Accounting
11. Incomplete	N/A	Holmes, Lucille	Corporate Headquarters	Accounting
12. Incomplete	N/A	Packer, Mary	Corporate Headquarters	Accounting
13. Incomplete	N/A	Schram, Johanna	Corporate Headquarters	Accounting
14. Incomplete	N/A	Woo, Josh	Corporate Headquarters	Accounting

1/9

How to Generate

1. Click **Reports**.
2. Click **Superseded Reports**, and then click **In Published (Tasks by Document)**.
3. Select documents or questionnaires to include in the report (see [Selecting Documents](#) for help), and then click **OK**.

Documents

Content Type: Documents

Site: Corporate Headquarters

Select By: Title

Title: Type here to search by title.

Available Documents: Select a document by typing a Title/Reference Number above or changing the Select By criteria.

Selected Documents

Shift+Click selects a span of checkboxes.

+ Add Filter(s) X Clear Filter(s)

OK

All options available for this report are displayed on the left. Notice that the number of currently selected documents/questionnaires is displayed after the **Documents** option, which you can click anytime to change your document/questionnaire selection.

Note: If you change your document/questionnaire selection after clicking **View Report**, click **View Report** again to refresh the report contents.

TASKS BY DOCUMENT - IN PUBLISHED

Documents 12 >

Arrangement >

Detail Options >

Task Options >

Output Format >

View Report

Please choose options on the left, then click View Report.

NAVEX GLOBAL

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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.

Arrangement

Documents Found: 211

Ref #	Title	Document Owner
52	Account Collection Process (v.1)	Hansen, Tom (Accounting Manager)
320	Account Collection Process (v.1)	Hansen, Tom (Accounting Manager)
320	Account Collection Process (v.2)	Hansen, Tom (Accounting Manager)
1	Account Collections Form (v.1)	Hansen, Tom (Accounting Manager)
2	Accounts Payable and Cash Distribution (v.1)	Driggs, Shiela (Director of Finance)
67	Americans with Disabilities Act (v.1)	Hansen, Tom (Accounting Manager)
86	Assembly Manuals (v.1)	Hansen, Tom (Accounting Manager)
3	Bad NSF Checks (v.1)	Hansen, Tom (Accounting Manager)
4	Bank Account Reconciliation (v.1)	Hansen, Tom (Accounting Manager)
53	Bank Loan Applications (v.1)	Hansen, Tom (Accounting Manager)

Page 1 of 22Records 1 - 10

OK

- 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. (Optional) Click **Detail Options**, and then select any of the following:

Documents32>

Arrangement>

Detail Options^

☒ Include Document Details

☐ All Users

☒ Custom Selection (0)

☐ Include Graphs

☐ Include Due Dates

Task Optionsv

Output Formatv

View Report

- **Include Document Details:** Shows the tasks associated with each document or questionnaire in the report.

Documents with Tasks

1. Cash Receipts (v.1)		Reference # 7		Document Owner: Hansen, Tom	
Status	In Published	Current Cycle	1	Reviewers	3
Date Last Submitted	04/04/2013	Current Level	1	Remaining	2
Total Days in Workflow Step	0	Days in Current Cycle	0	Total Complete	33%

Incomplete Tasks (2)

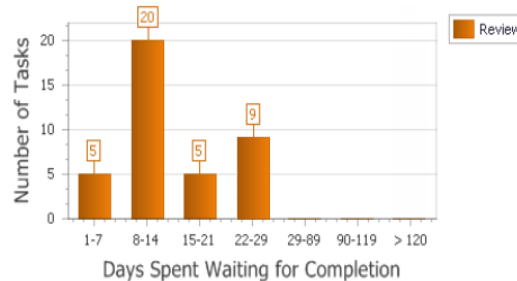
	<u>Action</u>	<u>Date</u>	<u>Users</u>	<u>Site</u>	<u>Department</u>
1.	Waiting	N/A	Benton, Carol	Corporate Headquarters	Environmental Services
2.	Waiting	N/A	Driggs, Shiela	Corporate Headquarters	Fiscal Services

With **Include Document Details** selected, you have the option to limit the documents or questionnaires included in the report to only those with tasks assigned to specific users. Click **Custom Selection**, and then select users in the same way as you would for a user-based report (see [Selecting Users](#) for help).

- **Include Graphs:** Adds a graph to the report's **Summary** area. The graph shows the number of days that tasks for the selected documents/questionnaires have been waiting for completion.

Summary

Documents Selected	Documents with Tasks Shown	Incomplete Tasks	Average Days in Workflow Step	Maximum Days in Workflow Step
12	12	23	9	23



- **Include Due Dates:** Adds a **Due Date** column to the task details.

Important: This option applies only if the **Include Document Details** option is selected.

Incomplete Tasks (2)						
	Action	Date	Due Date	Users	Site	Department
1.	Waiting	N/A	04/01/2013	Benton, Carol	Corporate Headquarters	Environmental Services
2.	Waiting	N/A	04/01/2013	Driggs, Shiela	Corporate Headquarters	Fiscal Services

6. (Optional) Click **Task Options**, and then do any of the following:
- Click a single task status (overdue, incomplete, or complete) or click **Incomplete & Complete Tasks**.

Documents 32 >

Arrangement >

Detail Options >

Task Options ^

☒ Only Overdue Tasks

☐ Only Incomplete Tasks

☐ Only Complete Tasks

☐ Incomplete & Complete Tasks

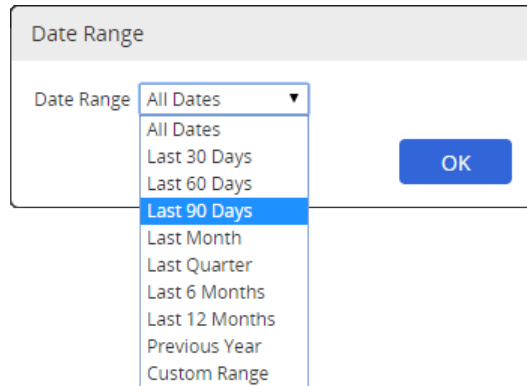
☐ Documents with no tasks

☐ Show localized tasks on master

Output Format >

View Report

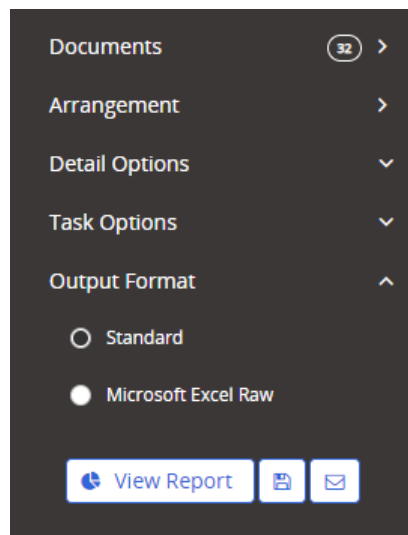
- If you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, the **Date** option appears. To show only the selected tasks that fall within a certain date range, click **Date**, select a date range, and then click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.




A dialog box titled "Date Range" with a dropdown menu. The dropdown menu is open, showing a list of date range options: "All Dates", "Last 30 Days", "Last 60 Days", "Last 90 Days" (highlighted in blue), "Last Month", "Last Quarter", "Last 6 Months", "Last 12 Months", "Previous Year", and "Custom Range". An "OK" button is located to the right of the dropdown menu.

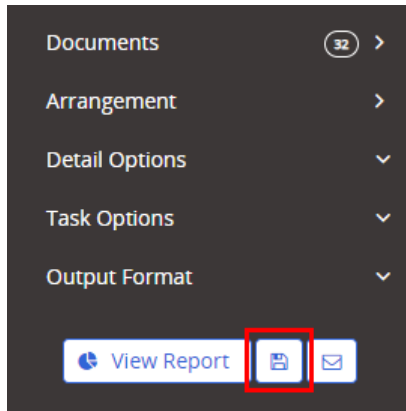
- By default, only the documents/questionnaires from those you selected that have tasks matching the current **Task Options** filters are included in the report. To include all selected documents/questionnaires in the report, even those without matching tasks, select the **Include documents without tasks** check box.

7. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.




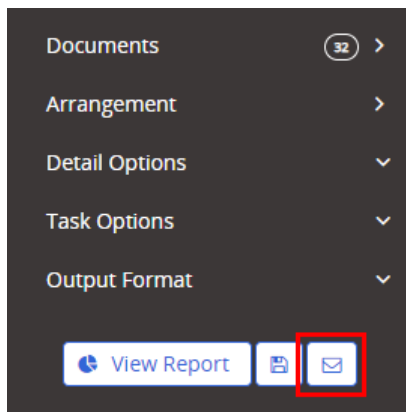
A dark-themed dialog box titled "Output Format". It contains two radio button options: "Standard" (unselected) and "Microsoft Excel Raw" (selected). At the bottom, there are three buttons: "View Report" (with a magnifying glass icon), a save icon, and an email icon.

8. (Optional) To save the current document/questionnaire selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

9. (Optional and conditional) Depending on your assigned permissions and email setup, after saving this report you may be able to schedule the summary portion of this report to be automatically generated and emailed to you by clicking  (see [Emailing a Report from a Saved Setup](#) for help).



10. 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.

TASKS BY DOCUMENT - IN PUBLISHED

Documents

Arrangement

Detail Options

Task Options

Output Format

View Report

Page 1 of 7

Tasks by Document - In Published - Incomplete

NAVEX Global

All Dates

Generated By: Tom Hansen

Generated: 05/24/2016 14:08

Summary

Documents Selected	Documents with Tasks Shown	Incomplete	Average Days in Workflow Step	Maximum Days in Workflow Step
2	2	24	19	26

Documents with Tasks

1 Account Collections Form (v.1)

Status	Approved	Current Cycle	Readers
Date Last Submitted	08/01/2015	Current Level	1
Total Days in Workflow Step	20	Days in Current Cycle	7
		Total Completed	0%

Incomplete Tasks (12)

Action	Date	Users	Site	Department
1. Incomplete	N/A	Lopez, Anna	Corporate Headquarters	Accounting
2. Incomplete	N/A	Cash, Jordan	Corporate Headquarters	Accounting
3. Incomplete	N/A	Gifford, Tawna	Corporate Headquarters	Accounting

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

Ref #	Title (Version)	Version Number	Document Owner Unique ID	Document Owner First Name	Document Owner Last Name	Job Title	Site	Department	Status	Date Last Submitted	Total Days in Workflow Step	Readers	Remaining Readers	Percent Completed	Action	Date Completed	Unique Employee ID	Reader First Name	Reader Last Name
1	101 Account Collec	1	thansen	Tom	Hansen	Accounti Corp	Accounting	Approv	2015/03/19	19	12	12	0%	Incompl	N/A	jcash	Jordan		
2	101 Account Collec	1	thansen	Tom	Hansen	Accounti Corp	Accounting	Approv	2015/03/19	19	12	12	0%	Incompl	N/A	tgifford	Tawna		
3	101 Account Collec	1	thansen	Tom	Hansen	Accounti Corp	Accounting	Approv	2015/03/19	19	12	12	0%	Incompl	N/A	thansen	Tom		
4	101 Account Collec	1	thansen	Tom	Hansen	Accounti Corp	Accounting	Approv	2015/03/19	19	12	12	0%	Incompl	N/A	wgifford	Will		

Report: Tasks by Document - All Workflow Statuses

Important: This report has been superseded by the [Tasks by Document - Current](#) and [Tasks by Document - All Tasks](#) reports. Because this report will be removed from PolicyTech in a future release, we strongly recommend using the next-generation reports instead. See [Transitioning to Next-Generation Reports](#) for help.

Description

Shows the status of all tasks for documents or questionnaires in all statuses. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:


Document Owner, Proxy Author, Administrator, Report Manager

Sample Report:

All Documents - Incomplete Tasks

NAVEX Global

All Dates

powered by 

Pages: 5

Generated By: Douglas Johnson

Generated: 2014/10/01 08:06

Summary

	Documents in Status	Incomplete Tasks	Incomplete Tasks Over 30 Days
Draft	0	0	0
Collaboration	2	2	2
Review	0	0	0
Approval	0	0	0
Pending	0	0	0
Published	4	103	103
Archived	0	0	0
Total	6	105	105

Documents with Tasks

1. Account Collections Form (v.1)		Reference # 1	Document Owner: Accounting, DocOwner	
Status	Approved	Current Cycle	N/A	Readers 4
Date Last Submitted	2011/08/01	Current Level	N/A	Remaining 4
Total Days in Workflow Step	1425	Days in Current Cycle	N/A	Total Completed 0%

Incomplete Tasks (4)

	Action	Date	Reader	Site	Department
1.	Incomplete	N/A	Cash, Jordan	Corporate Headquarters	Accounting
2.	Incomplete	N/A	Gifford, Tawna	Corporate Headquarters	Accounting
3.	Incomplete	N/A	Hansen, Tom	Corporate Headquarters	Accounting
4.	Incomplete	N/A	Woo, Josh	Corporate Headquarters	Accounting

2. Accounts Payable and Cash Distribution (v.1)		Reference # 2	Document Owner: Hansen, Tom	
Status	Approved	Current Cycle	N/A	Readers 4
Date Last Submitted	2011/03/02	Current Level	N/A	Remaining 4
Total Days in Workflow Step	1307	Days in Current Cycle	N/A	Total Completed 0%

1/5

1/5

How to Generate

1. Click **Reports**.
2. Click **Superseded Reports**, and then click **All Workflow Statuses (Tasks by Document)**.
3. Select documents or questionnaires to include in the report (see [Selecting Documents](#) for help), and then click **OK**.

Documents

Content Type: Documents

Site: Corporate Headquarters

Select By: Title

Title: Type here to search by title.

Available Documents

Select a document by typing a Title/Reference Number above or changing the Select By criteria.

Selected Documents

Shift+Click selects a span of checkboxes.

+ Add Filter(s) X Clear Filter(s)

OK

All options available for this report are displayed on the left. Notice that the number of currently selected documents/questionnaires is displayed after the **Documents** option, which you can click anytime to change your document/questionnaire selection.

Note: If you change your document/questionnaire selection after clicking **View Report**, click **View Report** again to refresh the report contents.

TASKS BY DOCUMENT - ALL WORKFLOW STATUSES

Documents (211)

Arrangement

Detail Options

Task Options

Output Format

View Report

Please choose options on the left, then click View Report.

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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.

Arrangement ✕

Documents Found: 211

Show/Hide Columns

☒ Ref #
☒ Title
☒ Document Owner

Ref #	Title	Document Owner
52	Account Collection Process (v.1)	Hansen, Tom (Accounting Manager)
320	Account Collection Process (v.1)	Hansen, Tom (Accounting Manager)
320	Account Collection Process (v.2)	Hansen, Tom (Accounting Manager)
1	Account Collections Form (v.1)	Hansen, Tom (Accounting Manager)
2	Accounts Payable and Cash Distribution (v.1)	Driggs, Shiela (Director of Finance)
67	Americans with Disabilities Act (v.1)	Hansen, Tom (Accounting Manager)
86	Assembly Manuals (v.1)	Hansen, Tom (Accounting Manager)
3	Bad NSF Checks (v.1)	Hansen, Tom (Accounting Manager)
4	Bank Account Reconciliation (v.1)	Hansen, Tom (Accounting Manager)
53	Bank Loan Applications (v.1)	Hansen, Tom (Accounting Manager)

Page 1 of 22 Records 1 - 10

OK

- 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. (Optional) Click **Detail Options**, and then select any of the following:

Documents 211 >

Arrangement >

Detail Options ^

☒ Include Document Details

☐ All Users

☒ Custom Selection (0)

☐ Include Graphs

☐ Include Due Dates

Task Options >

Output Format >

View Report

- **Include Document Details:** Shows the tasks associated with each document or questionnaire in the report.

Documents with Tasks

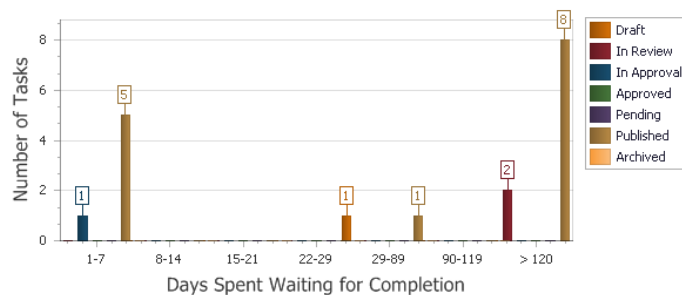
1. Cash Receipts (v.1)		Reference # 7		Document Owner: Hansen, Tom	
<u>Status</u>	Draft	<u>Current Cycle</u>	1	<u>Writers</u>	1
<u>Date Last Submitted</u>	06/30/2014	<u>Current Level</u>	1	<u>Remaining</u>	1
<u>Total Days in Workflow Step</u>	12	<u>Days in Current Cycle</u>	12	<u>Total Completed</u>	0%

Incomplete Tasks (1)

<u>Action</u>	<u>Date</u>	<u>Writer</u>	<u>Site</u>	<u>Department</u>
1. Waiting	N/A	Gifford, Tawna	Corporate Headquarters	Accounting

With **Include Document Details** selected, you have the option to limit the documents or questionnaires included in the report to only those with tasks assigned to specific users. Click **Custom Selection**, and then select users in the same way as you would for a user-based report (see [Selecting Users](#) for help).

- **Include Graphs:** Adds a graph to the report's Summary area. The graph shows the number of days that tasks for the selected documents/questionnaires have been waiting for completion.



- **Include Due Dates:** Adds a **Due Date** column to the task details.

Important: This option applies only if the **Include Document Details** option is selected.

Incomplete Tasks (2)

<u>Action</u>	<u>Date</u>	<u>Due Date</u>	<u>Users</u>	<u>Site</u>	<u>Department</u>
1. Waiting	N/A	04/01/2013	Benton, Carol	Corporate Headquarters	Environmental Services
2. Waiting	N/A	04/01/2013	Driggs, Shiela	Corporate Headquarters	Fiscal Services

6. (Optional) Click **Task Options**, and then do any of the following:

- Click a single task status (overdue, incomplete, incomplete with upcoming levels, or complete) or click **Incomplete & Complete Tasks**.

Documents211>

Arrangement>

Detail Optionsv

Task Options^

☒ Only Overdue Tasks

☐ Only Incomplete Tasks

☐ Incomplete Tasks with Upcoming Levels

☐ Only Complete Tasks

☐ Incomplete & Complete Tasks

☐ Documents with no tasks

☐ Show localized tasks on master

Output Formatv

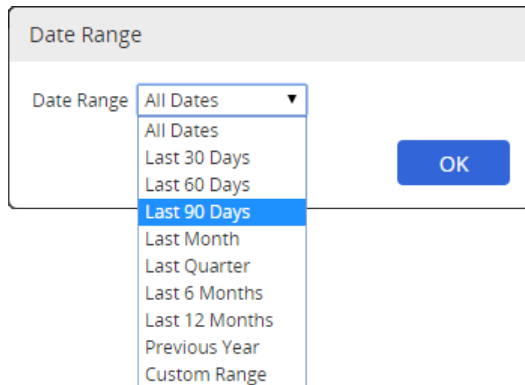
View Report

If you select **Incomplete Tasks with Upcoming Levels**, information will be shown about any tasks that users have not yet received notification for. These could be tasks for documents/questionnaires that have not yet reached a user's assigned status or tasks for documents/questionnaires currently in an assigned status but that have not yet reached the user's assigned task level.

Upcoming Tasks (1)					
	Action	Date	Reviewer	Site	Department
1.	Upcoming Task	N/A	Breen, Darren	Corporate Headquarters	Human Resources

- If you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, the **Date** option appears. To show only the selected tasks that fall within a certain date range, click **Date**, select a date range, and then

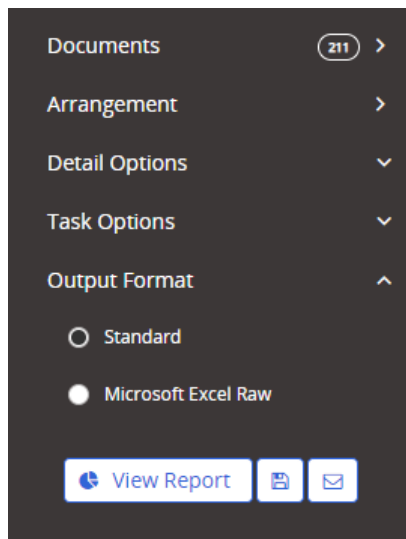
click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.




The image shows a 'Date Range' dialog box. It has a title bar 'Date Range' and a label 'Date Range' next to a dropdown menu. The dropdown menu is open, showing the following options: 'All Dates', 'Last 30 Days', 'Last 60 Days', 'Last 90 Days' (which is highlighted in blue), 'Last Month', 'Last Quarter', 'Last 6 Months', 'Last 12 Months', 'Previous Year', and 'Custom Range'. To the right of the dropdown is a blue 'OK' button.

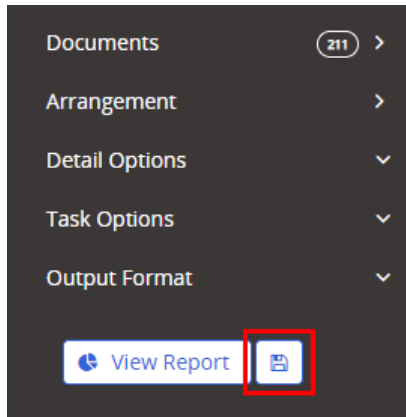
- By default, only the documents/questionnaires from those you selected that have tasks matching the current **Task Options** filters are included in the report. To include all selected documents/questionnaires in the report, even those without matching tasks, select the **Include documents without tasks** check box.

7. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.



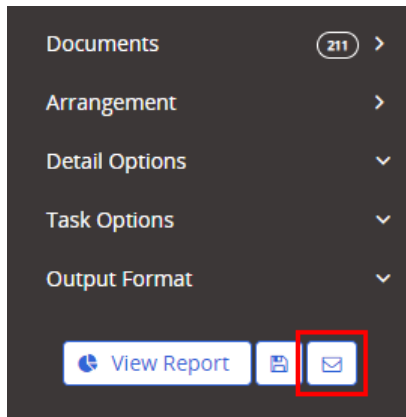
The image shows a dark-themed 'Output Format' dialog box. It has a title bar 'Documents' with a count '(211)' and a right arrow. Below the title bar are several options: 'Arrangement' with a right arrow, 'Detail Options' with a down arrow, 'Task Options' with a down arrow, and 'Output Format' with an up arrow. Under 'Output Format', there are two radio buttons: 'Standard' (which is selected) and 'Microsoft Excel Raw'. At the bottom, there are three buttons: 'View Report' (with a magnifying glass icon), a save icon, and an email icon.

8. (Optional) To save the current document/questionnaire selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

9. (Optional and conditional) Depending on your assigned permissions and email setup, after saving this report you may be able to schedule the summary portion of this report to be automatically generated and emailed to you by clicking ✉ (see [Emailing a Report from a Saved Setup](#) for help).



10. 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.

TASKS BY DOCUMENT - ALL WORKFLOW STATUSES

Documents211>

Arrangement>

Detail Options>

Task Options>

Output Format>

View Report

Page1of14

NAVEX GlobalAll Datespowered by policytech

Pages: 14Generated By: Douglas JohnsonGenerated: 10/31/2018 9:16 AM

All Documents - Incomplete Tasks

Summary

Workflow	Documents in Status	Incomplete	Incomplete Tasks Over 30 Days
Draft	13	13	4
Collaboration	2	2	1
Review	4	6	2
Approval	11	16	13
Pending	0	0	0
Published	11	105	90
Archived	0	0	0
Total	41	142	110

Documents with Tasks

1. Account Collection Process (v.1)Reference # 320Document Owner: Hansen, Tom

Status	Approved	Current Cycle	N/A	Assignees	11
Date Last Submitted	06/29/2018	Current Level	N/A	Remaining	10
Total Days in Workflow Step	123	Days in Current Cycle	N/A	Total Completed	9%

Incomplete Tasks (10)

Action	Date	Assignee	Site	Department
1. Incomplete	N/A	Addison, Victoria	Corporate Headquarters	Accounting
2. Incomplete	N/A	Cash, Jordan	Corporate Headquarters	Accounting
3. Incomplete	N/A	Gifford, Tawana	Corporate Headquarters	Accounting
4. Incomplete	N/A	Hansen, Tom	Corporate Headquarters	Accounting

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
	Ref. #	Title (Version)	Version Number	Document Owner Unique ID	Document Owner First Name	Document Owner Middle Name	Document Owner Last Name	Job Title	Site	Department	Status	Date Last Submitted	Total Days in Workflow Step	Assigned Users	Remaining Users	Percent Completed
1																
2	1	Account Collection	1	thansen	Tom		Hansen	Accounting	Corpo	Accounting	In Approval	09/10/2015	17	2	2	0%
3	1	Account Collection	1	thansen	Tom		Hansen	Accounting	Corpo	Accounting	In Approval	09/10/2015	17	2	2	0%
4	2	Accounts Payable	1	thansen	Tom		Hansen	Accounting	Corpo	Accounting	In Review	06/11/2015	23	4	1	0%
5	83	Air, Water & Soil	1	cbenton	Carol		Benton	Environm	Corpo	Environment	In Review	11/21/2015	9	1	1	0%
6	3	Bad NSF Checks	1	thansen	Tom		Hansen	Accounting	Corpo	Accounting	Draft	06/27/2015	34	4	4	0%

Report: Writer Tasks (Personal)

Description

Shows the status of your writing tasks. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:

Writer

Sample Report:

Writer Tasks - Incomplete

NAVEX Global
All Dates
powered by policytech

Pages: 1
Generated By: Tawna Gifford
Generated: 10/30/2014 09:04

Summary

Writers	Incomplete	Over 30 Days
1	2	2

Users with Tasks

1. Gifford, Tawna (Accounts Receivable Clerk)

Site: Corporate Headquarters

Department: Accounting

	Incomplete	Over 30 Days
	2	2

Incomplete Tasks (2)

	Action	Ref. #	Title (Version)	Start Date	Days Assigned
1.	Waiting	7	Cash Receipts (v.1)	06/30/2014	121
2.	Waiting	12	Invoice Billings (v.1)	06/30/2014	121

‡Task completed with Enhanced Validation

*Task completed by Proxy

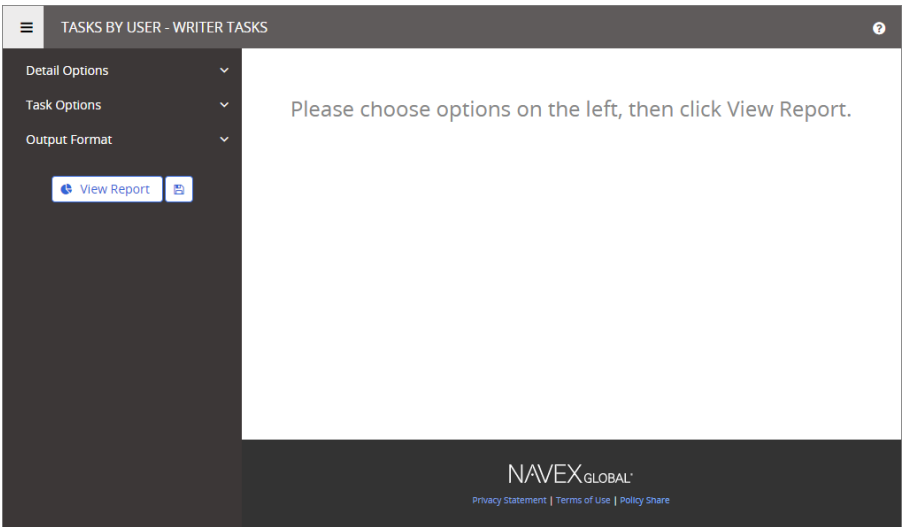
1/1

How to Generate

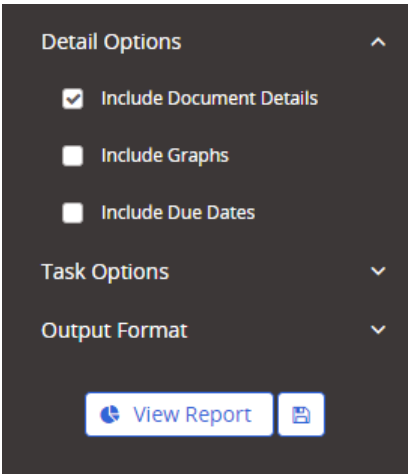
1. Click **Reports**.
2. Click **Superseded Reports**, and then click **Writer Tasks (My Tasks & Questionnaires)**.

Note: You will only see the task reports for the roles you've been assigned.

All options available for this report are displayed on the left.



3. (Optional) Click **Detail Options**, and then select any of the following:



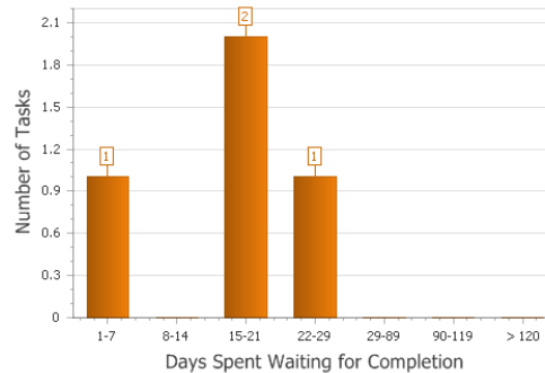
- **Include Document Details:** Shows the tasks associated with each document or questionnaire in the report.

1. Gifford, Tawna (Accounts Receivable Clerk)		Site: Corporate Headquarters	Department: Accounting	
			Incomplete	Over 30 Days
			2	2
Incomplete Tasks (2)				
	Action	Ref. #	Title (Version)	Start Date Days Assigned
1.	Waiting	7	Cash Receipts (v.1)	10/30/2014 18
2.	Waiting	12	Invoice Billings (v.1)	10/30/2014 18

- **Include Graphs:** Adds a graph to the report's **Summary** area.

Summary

Writers	Incomplete	Over 30 Days
1	4	0



- **Include Due Dates:** Adds a **Due Date** column to the task details.

Important: This option applies only if the **Include Document Details** option is selected.

4. (Optional) Click **Task Options**, and then do any of the following:

- Click a single task status (overdue, incomplete, incomplete with upcoming levels, or complete) or click **Incomplete & Complete Tasks**.

Detail Options ▾

Task Options ▴

☒ Only Overdue Tasks

☐ Only Incomplete Tasks

☐ Incomplete Tasks with Upcoming Levels

☐ Only Complete Tasks

☐ Incomplete & Complete Tasks

Output Format ▾

[View Report](#)

If you select **Incomplete Tasks with Upcoming Levels**, information will be shown about any writing tasks you have not yet received notification for. These could be tasks for documents/questionnaires that

have not yet reached the collaboration (writing) status or tasks for documents/questionnaires currently in collaboration but that have not yet reached your assigned writing level.

Upcoming Tasks (4)				
Action	Ref. #	Title (Version)	Start Date	Days Assigned
1. Upcoming Task	206	Bank Account Reconciliation - Downtown Branch (v.1)	N/A	N/A
2. Upcoming Task	11	Bank Account Reconciliation - East Branch (v.1)	N/A	N/A

- If you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, the **Date** option appears. To show only the selected tasks that fall within a certain date range, click **Date**, select a date range, and then click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.

Date Range

Date Range

All Dates

All Dates

Last 30 Days

Last 60 Days

Last 90 Days

Last Month

Last Quarter

Last 6 Months

Last 12 Months

Previous Year

Custom Range

OK

5. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.

Detail Options

Task Options

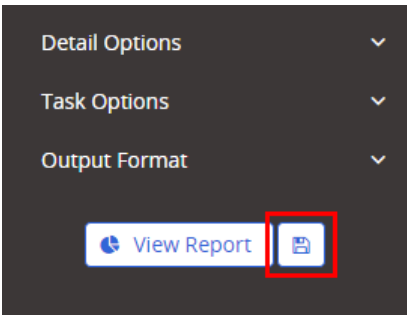
Output Format

Standard

Microsoft Excel Raw

View Report

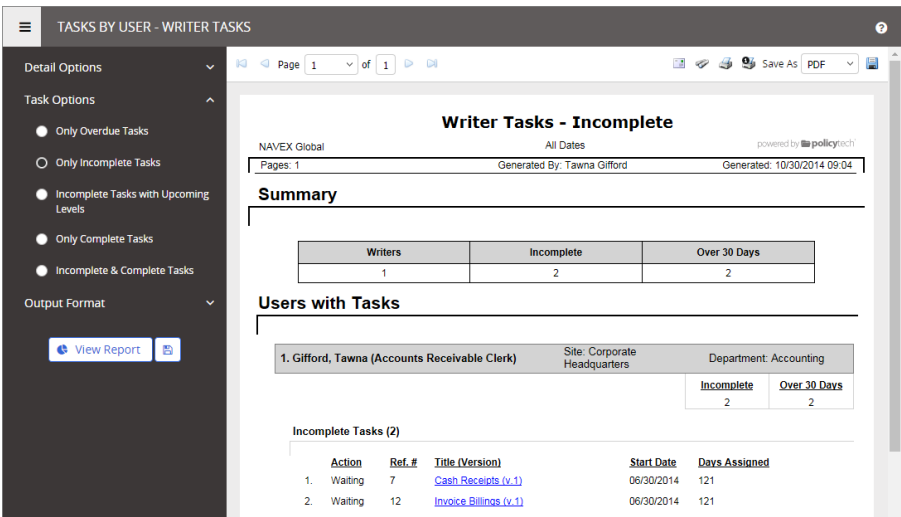
6. (Optional) To save the current settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

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**, follow the prompts to download and open the Excel file.

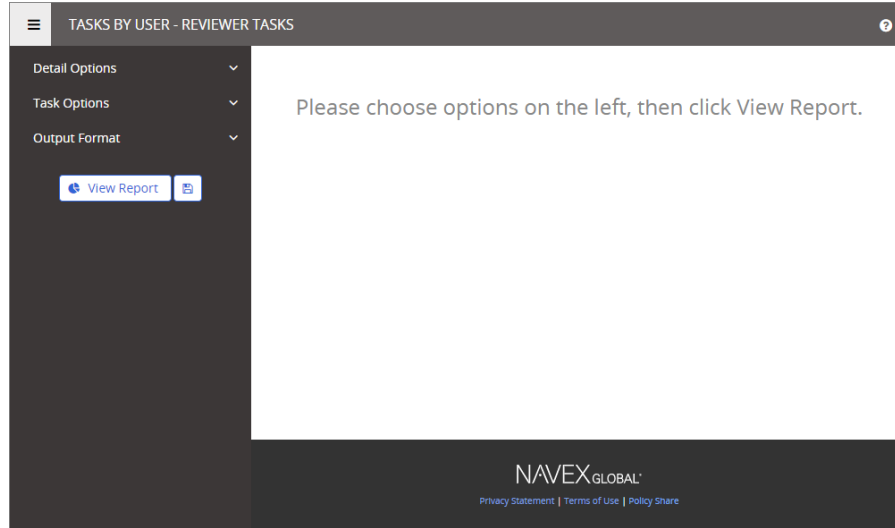
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	First N	Last N	Job Ttl	Unique Email	Site	Depart	Complete	Total Tasks	Over 30 Days	Average Days	Action		Date/Ref	Title (Version)	Vers	Start Date	Days Assigned	Task Type	
2	Tawna	Gifford	Account	tgifford	tgifford	Corpo	Accou	0	6	2	0	Waiting	N/A	7	Cash Receipts (	1	06/30/2014	12	Write
3	Tawna	Gifford	Account	tgifford	tgifford	Corpo	Accou	0	6	2	0	Waiting	N/A	12	Invoice Billings (	1	06/30/2014	12	Write
4	Tawna	Gifford	Account	tgifford	tgifford	Corpo	Accou	0	6	2	0	Upcoming Task	N/A	206	Bank Account R	1	N/A		N/A Write

How to Generate

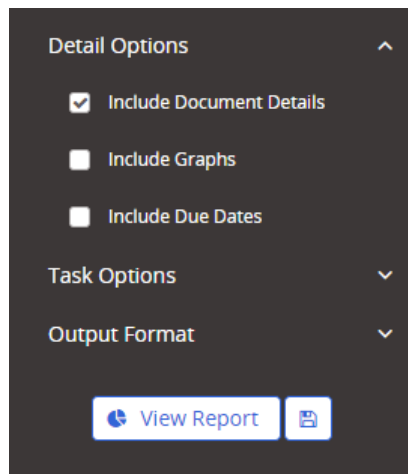
1. Click **Reports**.
2. Click **Superseded Reports**, and then click **Reviewer Tasks (My Tasks & Questionnaires)**.

Note: You will only see the task reports for the roles you've been assigned.

All options available for this report are displayed on the left.



3. (Optional) Click **Detail Options**, and then select any of the following:



- **Include Document Details:** Shows the tasks associated with each document or questionnaire in the report.

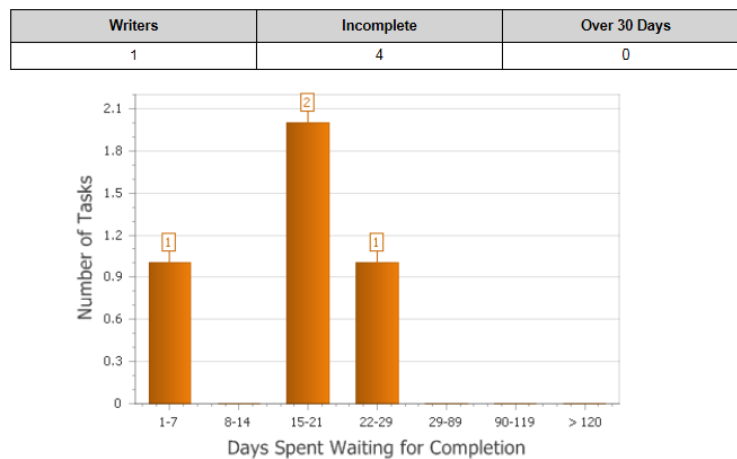
Users with Tasks

1. Hansen, Tom (Accounting Manager)		Site: Corporate Headquarters	Department: Accounting	
			Incomplete	Over 30 Days
			4	0

Incomplete Tasks (4)				
Action	Ref. #	Title (Version)	Start Date	Days Assigned
1. Waiting	23	Year End Closing (v.1)	10/30/2014	6
2. Waiting	22	Unsigned or Partial Pay (v.1)	10/30/2014	6
3. Waiting	21	Petty Cash (v.1)	10/30/2014	6
4. Waiting	8	Chart of Accounts (v.1)	10/30/2014	6

- **Include Graphs:** Adds a graph to the report's **Summary** area.

Summary



- **Include Due Dates:** Adds a **Due Date** column to the task details.

Important: This option applies only if the **Include Document Details** option is selected.

- (Optional) Click **Task Options**, and then do any of the following:
 - Click a single task status (overdue, incomplete, incomplete with upcoming levels, or complete) or click **Incomplete & Complete Tasks**.

Detail Options

Task Options

☐ Only Overdue Tasks

☐ Only Incomplete Tasks

☐ Incomplete Tasks with Upcoming Levels

☐ Only Complete Tasks

☐ Incomplete & Complete Tasks

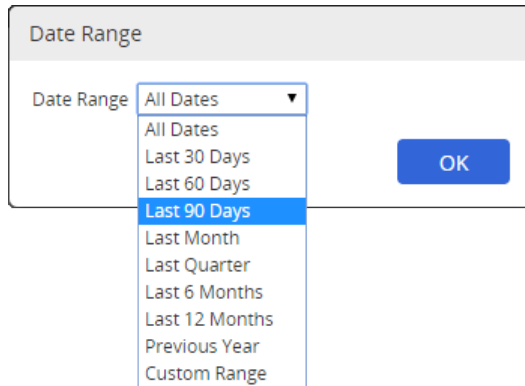
Output Format

View Report

If you select **Incomplete Tasks with Upcoming Levels**, information will be shown about any review tasks you have not yet received notification for. These could be tasks for documents/questionnaires that have not yet reached the reviewer status or tasks for documents/questionnaires currently in review but that have not yet reached your assigned review level.

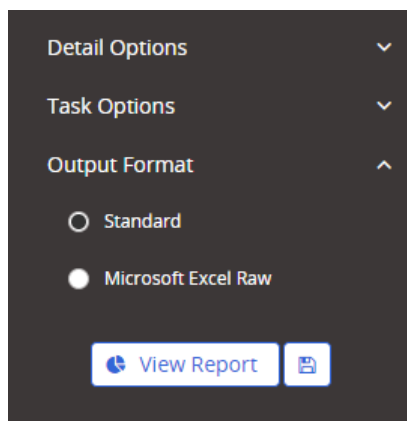
Upcoming Tasks (20)					
	Action	Ref. #	Title (Version)	Start Date	Days Assigned
5.	Upcoming Task	32	Cash Receipts (v.1)	N/A	N/A
6.	Upcoming Task	13	Code Red Procedures (v.1)	N/A	N/A
7.	Upcoming Task	31	Draft Document Moved to Approval (v.1)	N/A	N/A

- If you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, the **Date** option appears. To show only the selected tasks that fall within a certain date range, click **Date**, select a date range, and then click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.




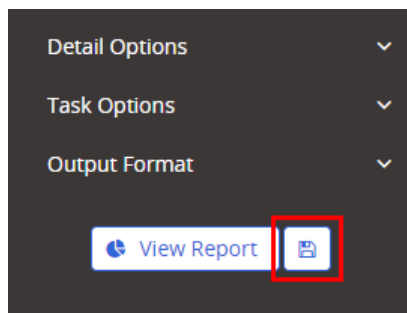
A dialog box titled "Date Range" with a dropdown menu labeled "Date Range". The dropdown menu is open, showing a list of date range options: "All Dates", "Last 30 Days", "Last 60 Days", "Last 90 Days" (highlighted in blue), "Last Month", "Last Quarter", "Last 6 Months", "Last 12 Months", "Previous Year", and "Custom Range". An "OK" button is located to the right of the dropdown menu.

5. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.



A dark-themed dialog box with three expandable sections: "Detail Options", "Task Options", and "Output Format". The "Output Format" section is expanded, showing two radio button options: "Standard" and "Microsoft Excel Raw". At the bottom, there are two buttons: "View Report" (with a magnifying glass icon) and a save icon (floppy disk).

6. (Optional) To save the current settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



A dark-themed dialog box with three expandable sections: "Detail Options", "Task Options", and "Output Format". The "Output Format" section is expanded, showing two radio button options: "Standard" and "Microsoft Excel Raw". At the bottom, there are two buttons: "View Report" (with a magnifying glass icon) and a save icon (floppy disk). The save icon is highlighted with a red rectangle.

Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

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.

TASKS BY USER - REVIEWER TASKS

Detail Options
Task Options
Output Format

View Report

Page 1 of 1

Save As PDF

NAVEX Global

All Dates

powered by policytech

Pages: 1

Generated By: Tom Hansen

Generated: 10/30/2014 08:58

Reviewer Tasks - Incomplete

Summary

Reviewers	Incomplete	Over 30 Days
1	4	0

Users with Tasks

1. Hansen, Tom (Accounting Manager)	Site: Corporate Headquarters	Department: Accounting
	Incomplete	Over 30 Days
	4	0

Incomplete Tasks (4)

Action	Ref. #	Title (Version)	Start Date	Days Assigned
1. Waiting	23	Year End Closing (v.1)	10/30/2014	0
2. Waiting	22	Unsigned or Partial Pay (v.1)	10/30/2014	0
3. Waiting	21	Petty Cash (v.1)	10/30/2014	0

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	First N	Last N	Job Title	Unique Email	Site	Depart	Incomplete	Total Tasks	Over 30 Days	Action	Date/Ref. #	Title (Version)	Vert	Start Date	Days Assigned	Task Ty	Task e		
2	Tom	Hansen	Account	thansen@hanse Corp	Accounting		4	4	0	Waiting	N/A	23 Year End Closi	1	10/30/2014		6	Review	No	
3	Tom	Hansen	Account	thansen@hanse Corp	Accounting		4	4	0	Waiting	N/A	22 Unsigned or Pa	1	10/30/2014		6	Review	No	
4	Tom	Hansen	Account	thansen@hanse Corp	Accounting		4	4	0	Waiting	N/A	21 Petty Cash (v.1	1	10/30/2014		6	Review	No	
5	Tom	Hansen	Account	thansen@hanse Corp	Accounting		4	4	0	Waiting	N/A	8 Chart of Accou	1	10/30/2014		6	Review	No	

Report: Approver Tasks (Personal)

Description

Shows the status of your approver tasks. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:

Approver

Sample Report:

Approver Tasks - Incomplete

NAVEX Global All Dates powered by policytech

Pages: 1 Generated By: John Barnett Generated: 10/29/2014 15:08

Summary

Approvers	Incomplete	Over 30 Days
1	5	0

Users with Tasks

1. Barnett, John (Approver)		Site: Corporate Headquarters	Department: Fiscal Services
		<u>Incomplete</u>	<u>Over 30 Days</u>
		5	0

Incomplete Tasks (5)

	Action	Ref. #	Title (Version)	Start Date	Days Assigned
1.	Waiting	217	Bank Account Reconciliation (v.1)	01/14/2011	13
2.	Waiting	218	Chart of Accounts (v.1)	01/14/2011	13
3.	Waiting	219	Check Requests (v.1)	01/14/2011	13
4.	Waiting	220	Petty Cash (v.1)	01/14/2011	13
5.	Waiting	216	Account Collections Form (v.2)	03/15/2011	13

‡Task completed with Enhanced Validation
 *Task completed by Proxy

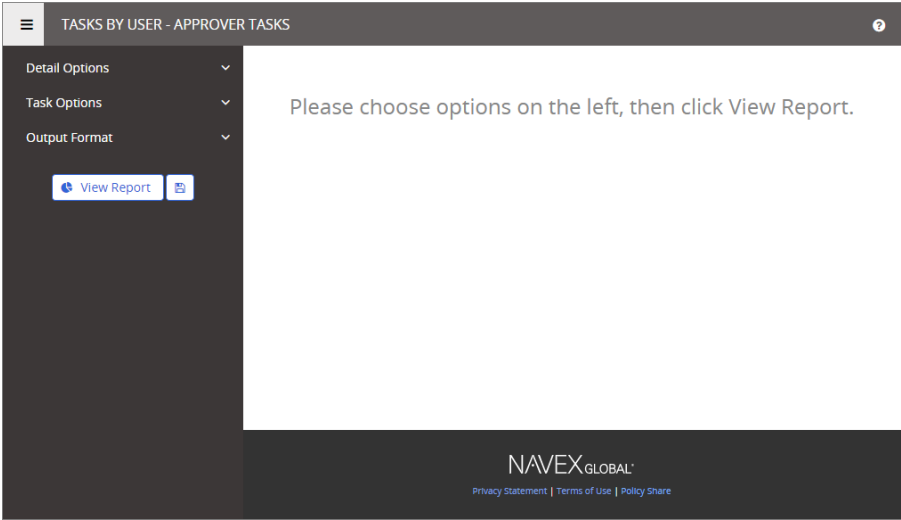
1/1

How to Generate

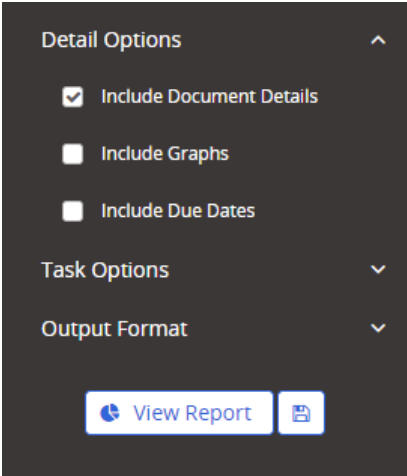
1. Click **Reports**.
2. Click **Superseded Reports**, and then click **Approver Tasks (My Tasks & Questionnaires)**.

Note: You will only see the task reports for the roles you've been assigned.

All options available for this report are displayed on the left.



3. (Optional) Click **Detail Options**, and then select any of the following:



- **Include Document Details:** Shows the tasks associated with each document or questionnaire in the report.

1. Howard, Susan (Document, Control Administrator)		Site: Corporate Headquarters	Department: Administration	
			Incomplete	Over 30 Days
			1	1

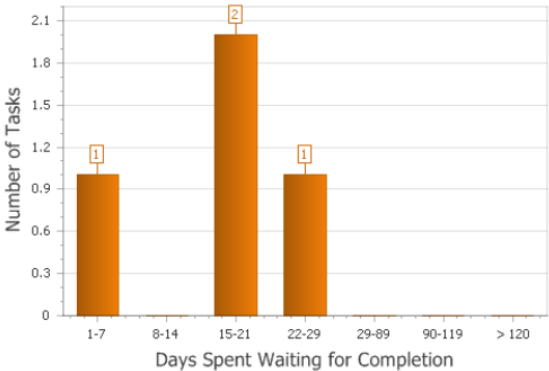
Incomplete Tasks (1)

Action	Ref. #	Title (Version)	Start Date	Days Assigned
1. Waiting	233	Vacation Policy (v.1)	01/25/2014	33

- **Include Graphs:** Adds a graph to the report's **Summary** area.

Summary

Approvers	Incomplete	Over 30 Days
1	4	0



- **Include Due Dates:** Adds a **Due Date** column to the task details.

Important: This option applies only if the **Include Document Details** option is selected.

Incomplete Tasks (1)						
Action	Ref. #	Title (Version)		Start Date	Days Assigned	Due Date
1. Waiting	233	Vacation Policy (v.1)		01/25/2011	39	01/24/2014

4. (Optional) Click **Task Options**, and then do any of the following:
- Click a single task status (overdue, incomplete, incomplete with upcoming levels, or complete) or click **Incomplete & Complete Tasks**.

Detail Options

Task Options

☒ Only Overdue Tasks

☐ Only Incomplete Tasks

☐ Incomplete Tasks with Upcoming Levels

☐ Only Complete Tasks

☐ Incomplete & Complete Tasks

Output Format

View Report

If you select **Incomplete Tasks with Upcoming Levels**, information will be shown about any approval tasks you have not yet received notification for. These could be tasks for documents/questionnaires that have not yet reached the approval status or tasks for documents/questionnaires currently in approval but that have not yet reached your assigned approval level.

Upcoming Tasks (2)					
	Action	Ref. #	Title (Version)	Start Date	Days Assigned
1.	Upcoming Task	204	Account Collections Form (v.1)	N/A	N/A
2.	Upcoming Task	4	Bank Account Reconciliation (v.2)	N/A	N/A

- If you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, the **Date** option appears. To show only the selected tasks that fall within a certain date range, click **Date**, select a date range, and then click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.

Date Range

Date Range

All Dates

All Dates

Last 30 Days

Last 60 Days

Last 90 Days

Last Month

Last Quarter

Last 6 Months

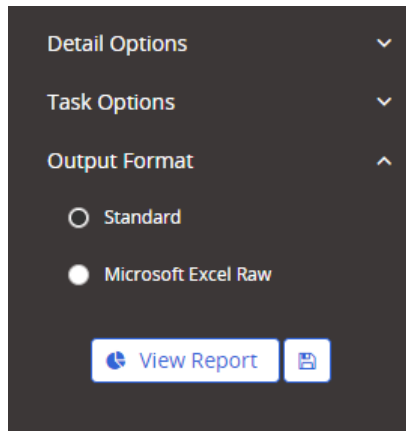
Last 12 Months


Previous Year

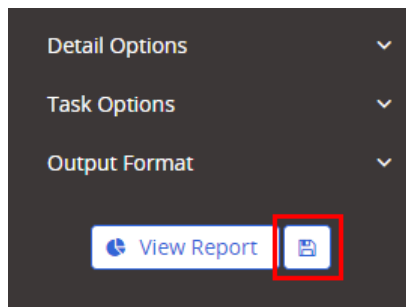
Custom Range

OK

5. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.



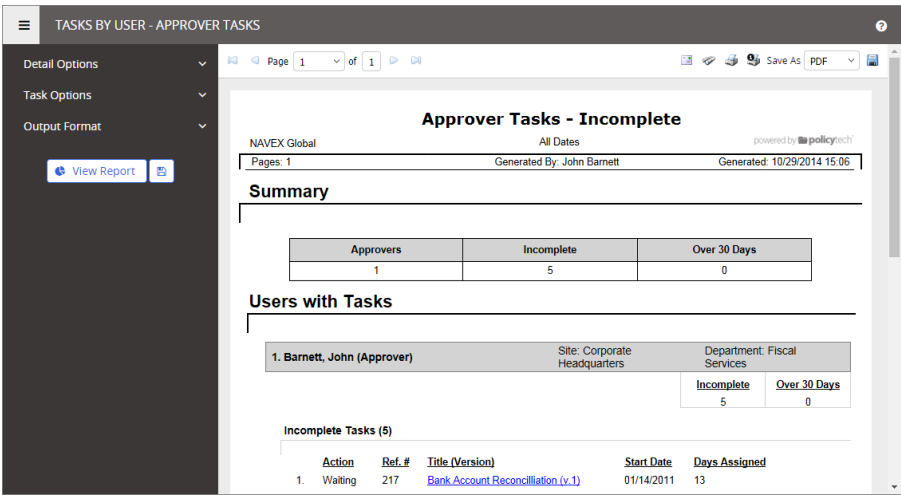
6. (Optional) To save the current settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

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**, follow the prompts to download and open the Excel file.

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
1	First N	Last N	Job Titl	Unique E	Email Site	Depa	Incomplete	Total	Over 30 Days	Action	Date/Time	Ref. #	Title (Version)	Vers	Start Date	Days Assigned	Task	Tyt	Task comp							
2	John	Barnett	Approv	j.barnett	j.barnett	Corp	Fisca	5	5	5	Waiting	N/A	217	Bank Account Ri	1	01/14/2011	13	Approve	No							
3	John	Barnett	Approv	j.barnett	j.barnett	Corp	Fisca	5	5	5	Waiting	N/A	218	Chart of Account	1	01/14/2011	22	Approve	No							
4	John	Barnett	Approv	j.barnett	j.barnett	Corp	Fisca	5	5	5	Waiting	N/A	219	Check Requests	1	01/14/2011	9	Approve	No							
5	John	Barnett	Approv	j.barnett	j.barnett	Corp	Fisca	5	5	5	Waiting	N/A	220	Petty Cash (v.1)	1	01/14/2011	36	Approve	No							

Report: Assignee Tasks (Personal)

Description

Shows the status of your assigned reading/completion tasks. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:

Reader

Sample Report:

Reader Tasks - Incomplete

NAVEX Global
All Dates
powered by policytech

Pages: 1
Generated By: Tawna Gifford
Generated: 10/30/2014 08:22

Summary

Readers	Incomplete	Over 30 Days
1	5	1

Users with Tasks

1. Gifford, Tawna (Accounts Receivable Clerk)	Site: Corporate Headquarters	Department: Accounting
	Incomplete	Over 30 Days
	5	1

Incomplete Tasks (5)

	Action	Ref. #	Title (Version)	Start Date	Days Assigned
1.	Incomplete	242	Vacation Policy (v.1)	10/13/2014	17
2.	Incomplete	1	Account Collections Form (v.1)	10/01/2014	29
3.	Incomplete	253	Inventory Sheet (v.2)	10/29/2011	1
4.	Incomplete	2	Accounts Payable and Cash Distribution (v.1)	09/15/2011	45
5.	Incomplete	5	Capitilization (v.2)	10/01/2014	29

†Task completed with Enhanced Validation

*Task completed by Proxy

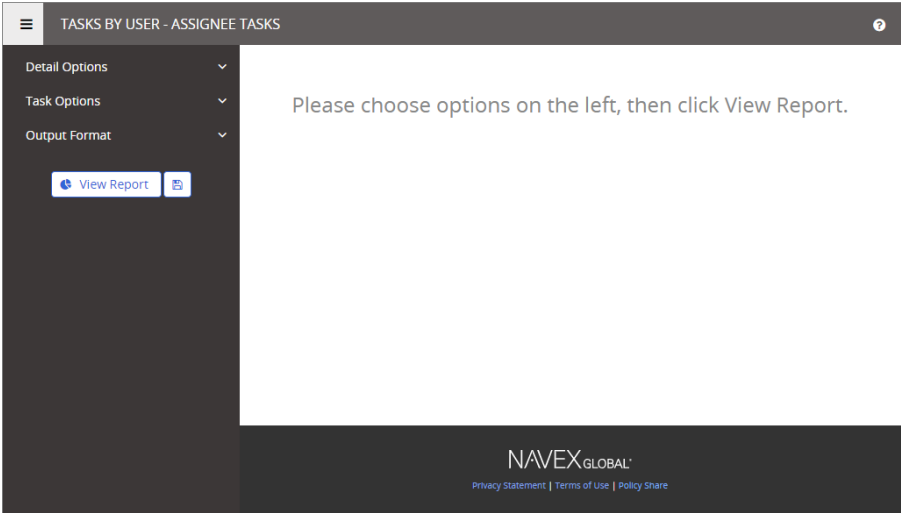
1/1

How to Generate

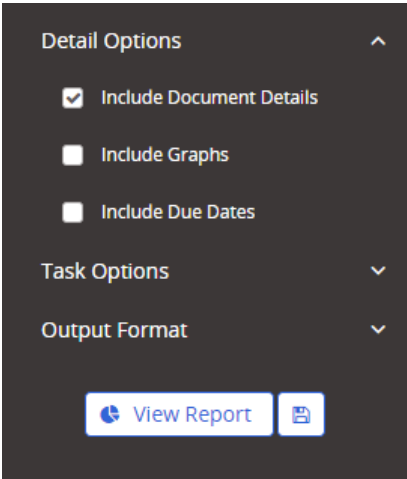
1. Click **Reports**.
2. Click **Superseded Reports**, and then click **Assignee Tasks (My Tasks & Questionnaires)**.

Note: You will only see the task reports for the roles you've been assigned.

All options available for this report are displayed on the left.



3. (Optional) Click **Detail Options**, and then select any of the following:



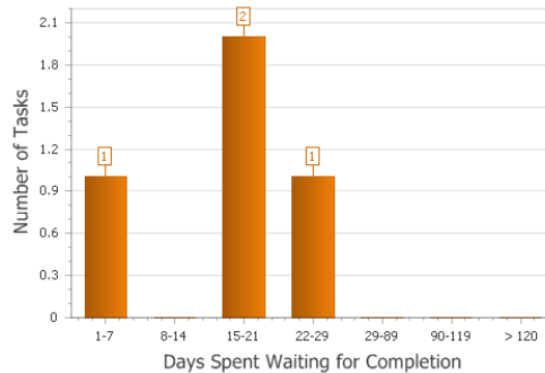
- **Include Document Details:** Shows the tasks associated with each document or questionnaire in the report.

1. Gifford, Tawna (Accounts Receivable Clerk)		Site: Corporate Headquarters	Department: Accounting	
			Incomplete	Over 30 Days
			4	1
Incomplete Tasks (4)				
	Action	Ref. #	Title (Version)	Start Date Days Assigned
1.	Incomplete	242	Vacation Policy (v.1)	11/14/2014 12
2.	Incomplete	253	Inventory Sheet (v.2)	10/29/2014 18
3.	Incomplete	2	Accounts Payable and Cash Distribution (v.1)	11/15/2014 1
4.	Incomplete	5	Capitilization (v.2)	09/01/2014 76

- **Include Graphs:** Adds a graph to the report's **Summary** area.

Summary

Writers	Incomplete	Over 30 Days
1	4	0



- **Include Due Dates:** Adds a **Due Date** column to the task details.

Important: This option applies only if the **Include Document Details** option is selected.

4. (Optional) Click **Task Options**, and then do any of the following:


- Click a single task status (overdue, incomplete, or complete) or click **Incomplete & Complete Tasks**.

- If you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, the **Date** option appears. To show only the selected tasks that fall within a certain date range, click **Date**, select a date range, and then click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.

A dialog box titled "Date Range" with a dropdown menu and an "OK" button. The dropdown menu is open, showing the following options: All Dates, Last 30 Days, Last 60 Days, Last 90 Days (highlighted), Last Month, Last Quarter, Last 6 Months, Last 12 Months, Previous Year, and Custom Range.

5. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.

A dialog box with a dark background. It has three sections: "Detail Options" with a downward arrow, "Task Options" with a downward arrow, and "Output Format" with an upward arrow. Under "Output Format", there are two radio buttons: "Standard" (unselected) and "Microsoft Excel Raw" (selected). At the bottom, there are two buttons: "View Report" (with a magnifying glass icon) and a save icon (floppy disk).

6. (Optional) To save the current settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.

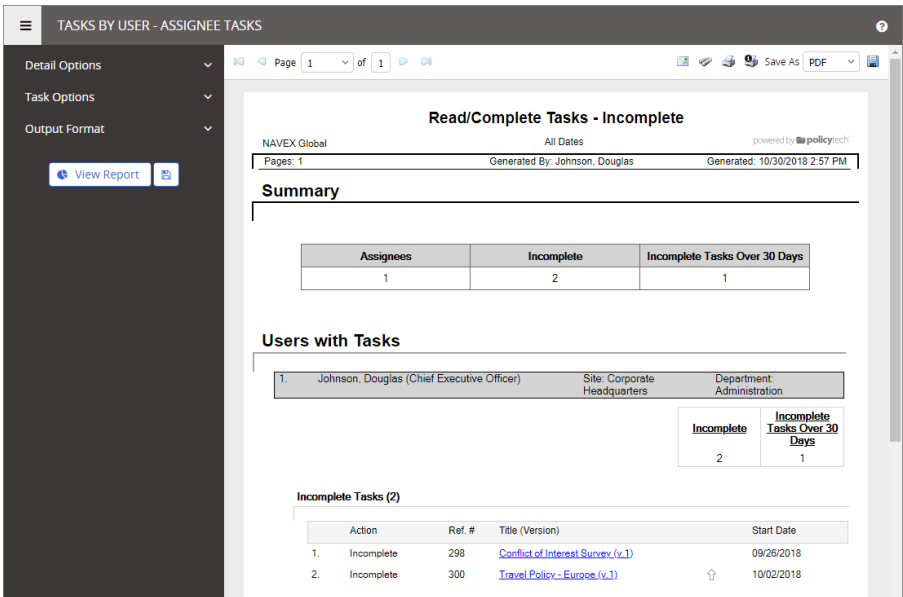
A dialog box with a dark background, identical to the one in the previous step. The "View Report" button and the save icon (floppy disk) are both highlighted with a red rectangle.

Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

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**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	First Name	Last Name	Job Title	Unique Email	Site	Department	Incomplete	Total Tasks	Over 30 Days	Action	Date/Time	Ref. #	Title (Version)	Vers	Start Date	Days Assigned	Task Type	Task Status	Task Owner	
2	Tawna	Gifford	Account	tgifford	Corp	Accoi	4	4	1	Incomplete	N/A	242	Vacation Policy	1	1/14/2014	12	Read	No	No	
3	Tawna	Gifford	Account	tgifford	Corp	Accoi	4	4	1	Incomplete	N/A	253	Inventory Sheet	2	10/29/2014	18	Read	No	No	
4	Tawna	Gifford	Account	tgifford	Corp	Accoi	4	4	1	Incomplete	N/A	2	Accounts Paya	1	11/15/2014	1	Read	No	No	
5	Tawna	Gifford	Account	tgifford	Corp	Accoi	4	4	1	Incomplete	N/A	5	Capitalization	2	9/1/2014	76	Read	No	No	

Report: All Workflow Tasks (Personal)

Description

Shows the status of all your tasks. You can choose to include only those tasks that are incomplete, overdue, or completed.

Available to users with the following roles or permissions:

All users with any assigned document role or system permission.

Sample Report:

All Workflow Tasks - Incomplete

NAVEX Global All Dates powered by policytech

Pages: 1 Generated By: Tom Hansen Generated: 10/29/2014 14:38

Summary

Workflow	** Number of Users	Incomplete	Over 30 Days
Write	0	0	0
Review	0	0	0
Approve	0	0	0
Read	1	5	5
Periodic Review	1	2	2
Link Update	0	0	0
Total	N/A	7	7

** The sum of this column may not equal the total listed since users can be assigned to multiple roles.

Users with Tasks

1. Hansen, Tom (Accounting Manager)	Site: Corporate Headquarters	Department: Accounting
-------------------------------------	------------------------------	------------------------

Workflow	Incomplete	Over 30 Days
Read	5	0
Periodic Review	2	2
Total	7	2

Incomplete Tasks (7)

Action	Ref. #	Title (Version)	Days Assigned	Task Type
1. Waiting	2	Accounts Payable and Cash Distribution (v.1)	10	Periodic Review
2. Waiting	3	Bad NSF Checks (v.1)	37	Periodic Review
3. Incomplete	242	Vacation Policy (v.1)	13	Read
4. Incomplete	1	Account Collections Form (v.1)	13	Read
5. Incomplete	253	Inventory Sheet (v.2)	11	Read
6. Incomplete	2	Accounts Payable and Cash Distribution (v.1)	10	Read
7. Incomplete	5	Capitalization (v.2)	12	Read

†Task completed with Enhanced Validation
 Critical
*Task completed by Proxy
 Overdue

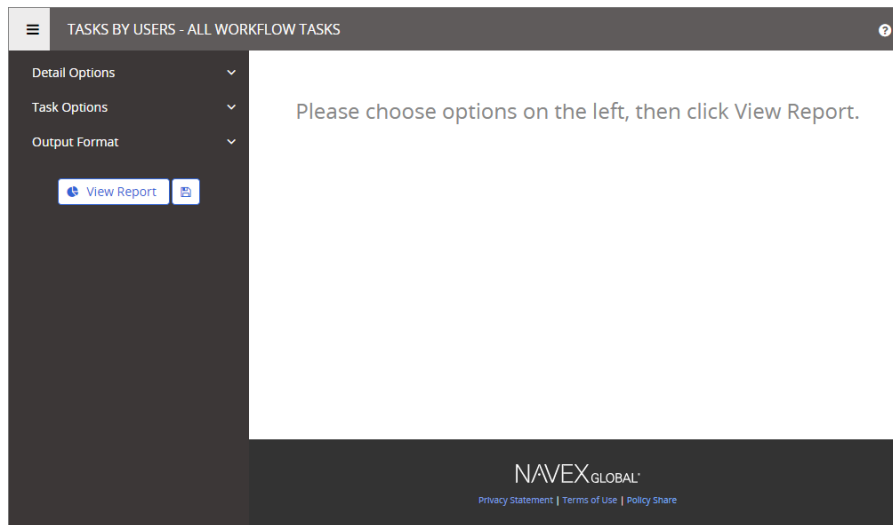
1/1

How to Generate

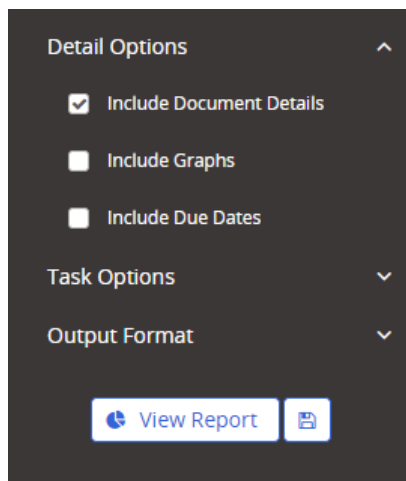
1. Click **Reports**.
2. Click **Superseded Reports**, and then click **All Workflow Tasks (My Tasks & Questionnaires)**.

Note: You will only see the task reports for the roles you've been assigned.

All options available for this report are displayed on the left.



3. (Optional) Click **Detail Options**, and then select any of the following:



- **Include Document Details:** Shows the tasks associated with each document or questionnaire in the report.

1. Howard, Susan (Document, Control Administrator)	Site: Corporate Headquarters		Department: Administration	
	Workflow	Incomplete	Over 30 Days	
	Review	1	0	
	Approve	1	0	
	Read	2	1	
	Periodic Review	3	0	
	Link Update	2	0	
	Total	9	1	

Incomplete Tasks (21)

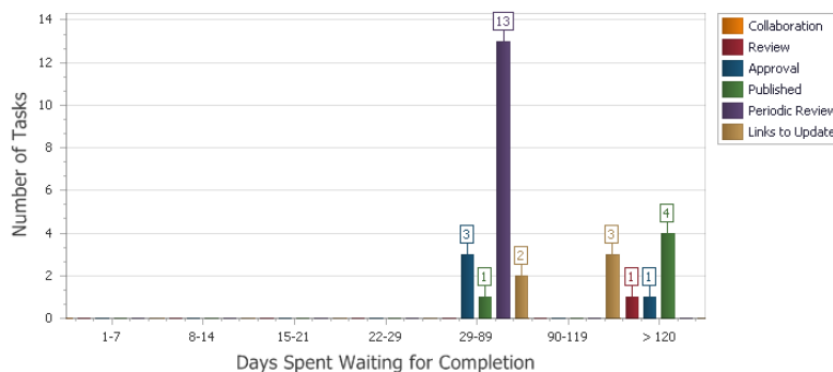
Action	Ref. #	Title (Version)	Days Assigned	Task Type
1. Waiting	270	Fixed Asset Control (v.1)	17	Periodic Review
2. Waiting	288	Performance Review Schedule (v.1)	17	Periodic Review
3. Waiting	287	Travel Expense Policy (v.1)	12	Periodic Review
4. Waiting	270	Fixed Asset Control (v.1)	62	Link Update
5. Waiting	287	Travel Expense Policy (v.1)	2	Link Update
6. Incomplete	246	Mark as Read (Required) (v.1)	39	Read
7. Incomplete	260	Special Characters (v.1)	13	Read
8. Waiting	222	Evacuation Procedures (v.1)	10	Review
9. Waiting	233	Vacation Policy (v.1)	3	Approve

- **Include Graphs:** Adds a graph to the report's **Summary** area. The graph shows the number of days your tasks have been waiting for completion.

Summary

Workflow	** Number of Users	Incomplete	Over 30 Days
Write	0	0	0
Review	1	1	1
Approve	1	135	2
Read	1	18	5
Periodic Review	1	17	15
Link Update	1	9	5
Total	N/A	180	28

** The sum of this column may not equal the total listed since users can be assigned to multiple roles.



- **Include Due Dates:** Adds a **Due Date** column to the task details.

Important: This option applies only if the **Include Document Details** option is selected.

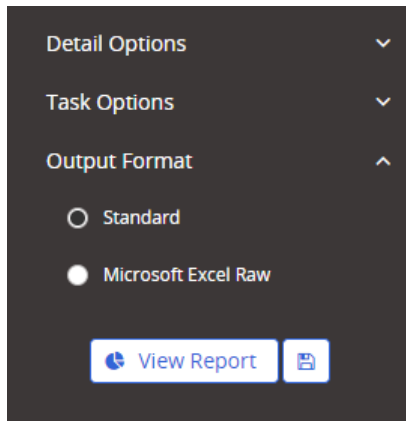
Incomplete Tasks (21)						
Action	Ref. #	Title (Version)	Due Date	Days Assigned	Task Type	
1. Waiting	270	Fixed Asset Control (v.1)	10/27/2014	1370	Periodic Review	
2. Waiting	288	Performance Review Schedule (v.1)	11/03/2014	127	Periodic Review	
3. Waiting	287	Travel Expense Policy (v.1)	09/19/2014	127	Periodic Review	
4. Waiting	270	Fixed Asset Control (v.1)	10/16/2014	1162	Link Update	


4. (Optional) Click **Task Options**, and then do any of the following:

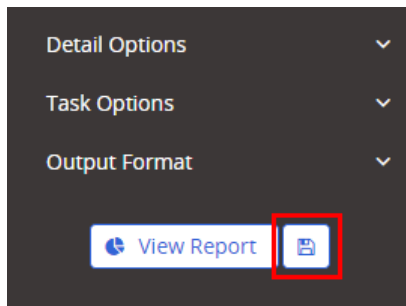
- Click a single task status (overdue, incomplete, or complete) or click **Incomplete & Complete Tasks**.

- If you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, the **Date** option appears. To show only the selected tasks that fall within a certain date range, click **Date**, select a date range, and then click **OK**. If you click **Custom Range**, also type or select **From** and **To** dates, and then click **OK**.

5. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.



6. (Optional) To save the current settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

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.

TASKS BY USERS - ALL WORKFLOW TASKS

Page 1 of 2

Save As PDF

Detail Options

Task Options

Output Format

View Report

All Workflow Tasks - Incomplete

NAVEX GlobalAll Datespowered by policytech

Pages: 2Generated By: Johnson, DouglasGenerated: 10/30/2018 2:28 PM

Summary

Workflow	Number of Users**	Incomplete	Incomplete Tasks Over 30 Days
Writers	0	0	0
Reviewers	0	0	0
Approvers	0	0	0
Assignees	1	2	1
Periodic Review	1	1	1
Link Update	0	0	0
Total	N/A	3	2

** The sum of this column may not equal the total listed since users can be assigned to multiple roles.

Users with Tasks

Workflow	Incomplete	Incomplete Tasks Over 30 Days
1. Johnson, Douglas (Chief Executive Officer)	Site: Corporate Headquarters	Department: Administration

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file.

	A	B	C	D	E	F	G	H	I	J	
1	First Name	Last Name	Job Title	Unique ID	Email	Site	Department	Writer Tasks - Incomplete	Writer Tasks	Writer Tasks - Over 30 Days	Reviewer Tasks
2	Douglas	Johnson	Chief Executive Officer	E2	djohns	Corporate	Admin	0	0	0	
3	Douglas	Johnson	Chief Executive Officer	E2	djohns	Corporate	Admin	0	0	0	
4	Douglas	Johnson	Chief Executive Officer	E2	djohns	Corporate	Admin	0	0	0	

Report: Questionnaire Results by Document

Important: This report has been superseded by the [next-generation Questionnaire Results by Document report](#). Because this report will be removed from PolicyTech in a future release, we strongly recommend using the next-generation reports instead. See [Transitioning to Next-Generation Reports](#) for help.

Description


Shows all users' questionnaire results for the selected documents or questionnaires.

Available to users with the following roles or permissions:

Document Owner, Report Manager, Administrator

Sample Report:

Questionnaire Results by Document

NAVEX Global powered by  policytech

Pages: 2 Generated By: Douglas Johnson Generated: 11/05/2014 14:37

[1. Family and Medical Leave \(v.1\)](#)

Reference #	331	Questionnaire Version	2	Document Owner	Johnson, Douglas
-------------	-----	-----------------------	---	----------------	------------------

Questionnaire Results




Scores		User Results		User Stats	
Average Score	86%	Average Attempts	1	Assigned Users	4
High Score	86%	Failures	0	Passing Users	1
Median Score	86%	Passed on First Attempt	100%	Users Yet to Pass	3
Low Score	86%				

Numbers include multiple questionnaire completions by a user as well as users not assigned to take questionnaire.





Question Overview (7)

Objective: Understand the different types of leave and the eligibility rules.





Q1 - How long must an employee have been employed before being eligible for leave?

Answers	Times Chosen	Percentage
 3 months	0 / 1	0%
 6 months	0 / 1	0%
 12 months	1 / 1	100%

Q2 - Which of the following is not a recognized leave type for our company?

Answers	Times Chosen	Percentage
 Medical leave	0 / 1	0%
 Pregnancy leave	0 / 1	0%
 Research leave	1 / 1	100%
 Paternity leave	0 / 1	0%

Q3 - What is the maximum amount of time allowed for pregnancy leave?

Answers	Times Chosen	Percentage
 6 weeks	0 / 1	0%
 12 weeks	1 / 1	100%
 18 weeks	0 / 1	0%
 20 weeks	0 / 1	0%

1/2

How to Generate

1. Click **Reports**.
2. Click **Superseded Reports**, and then click **Questionnaire Results by Document (Questionnaire Reports)**.
3. Select documents or questionnaires to include in the report (see [Selecting Documents](#) for help), and then click **OK**.

Documents

Content Type: Documents

Site: Corporate Headquarters

Select By: Title

Title: Type here to search by title.

+ Add All From This Site + Add All From All Sites

Available Documents
Select a document by typing a Title/Reference Number above or changing the Select By criteria.

Selected Documents

Shift+Click selects a span of checkboxes.

+ Add Filter(s) x Clear Filter(s)

OK

All options available for this report are displayed on the left. Notice that the number of currently selected documents/questionnaires is displayed after the **Documents** option, which you can click anytime to change your document/questionnaire selection.

Note: If you change your document/questionnaire selection after clicking **View Report**, click **View Report** again to refresh the report contents.

QUESTIONNAIRE RESULTS BY DOCUMENT

Documents 10

Arrangement

Detail Options

Output Format

View Report

Please choose options on the left, then click View Report.

NAVEX GLOBAL

Privacy Statement | Terms of Use | Policy Share

4. (Optional) Click **Arrangement** and do any of the following:

- To change the default report columns, click **Show/Hide Columns**, and then select **Date Approved**.

Arrangement

Documents Found: 18

Show/Hide Columns

☒ Ref #

☒ Title (Version)

☒ Document Owner

☐ Date Approved

Ref #	Title (Version)	Document Owner
1	Account Collections Form (v.1)	Accounting, DocOwner
1	Account Collections Form (v.2)	Hansen, Tom (Accounting Manager)
2	Accounts Payable and Cash Distribution (v.1)	Hansen, Tom (Accounting Manager)
67	Americans with Disabilities Act (v.1)	Human Resources, DocOwner (Owner)
3	Bad NSF Checks (v.1)	Hansen, Tom (Accounting Manager)
119	Board of Directors (v.1)	Owner, Document (Owner)
311	Code of Conduct (v.1)	Johnson, Douglas (Chief Executive Officer)
125	Controlling Legal Costs (v.1)	Owner, Document (Owner)
305	Fair Trade Policy (v.1)	Johnson, Douglas (Chief Executive Officer)
295	↓ Family and Medical Leave (v.2)	Johnson, Douglas (Chief Executive Officer)

Page 1 of 2 Records 1 - 10

OK

- 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. (Optional) Click **Detail Options**, and then select any of the following:

Documents18

Arrangement

Detail Options

☒ Include Questionnaire Details

☐ Include User Results

☐ Show questionnaire results of localized copies under their master questionnaires

☐ Include Graphs

Output Format

View Report

- **Include Questionnaire Details:** Includes details on each questionnaire question.

Question Overview (7)

Objective: Understand the different types of leave and the eligibility rules.

Q1 - How long must an employee have been employed before being eligible for leave?

Answers	Times Chosen	Percentage
<input type="radio"/> 3 months	0 / 1	0%
<input type="radio"/> 6 months	0 / 1	0%
<input checked="" type="radio"/> 12 months	1 / 1	100%

Q2 - Which of the following is not a recognized leave type for our company?

Answers	Times Chosen	Percentage
<input type="radio"/> Medical leave	0 / 1	0%
<input type="radio"/> Pregnancy leave	0 / 1	0%
<input checked="" type="radio"/> Research leave	1 / 1	100%
<input type="radio"/> Paternity leave	0 / 1	0%

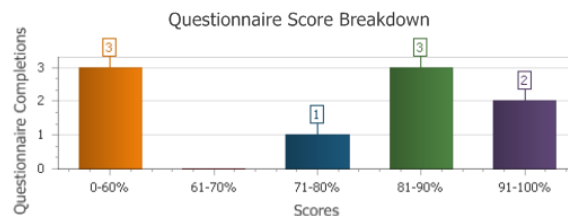
- **Include User Results:** Include scoring details for each user who has taken the questionnaire so far.

Note: If a user took a document questionnaire more than once by clicking **Retake Questionnaire**, that user's name will appear more than once in the **User Results** list.

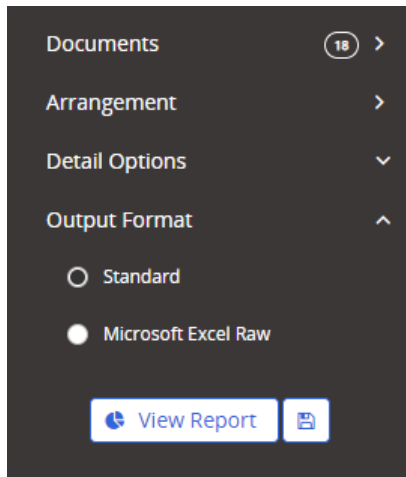
Questionnaire Results (9)


	Site	Department	User	Job Title	Date/Time Taken	Score
1.	Corporate Headquarters	Administration	Janice Aguiar	Accounts Payable Clerk	04/12/2013 11:29 AM	86
2.	Corporate Headquarters	Accounting	Jordon Cash	Accounts Payable Clerk	04/12/2013 11:24 AM	57
3.	Corporate Headquarters	Accounting	Jordon Cash	Accounts Payable Clerk	04/12/2013 11:24 AM	86
4.	Corporate Headquarters	Accounting	Tawna Gifford	Accounts Receivable Clerk	04/12/2013 11:27 AM	100
5.	Corporate Headquarters	Accounting	Tom Hansen	Accounting Manager	04/12/2013 11:28 AM	100
6.	Corporate Headquarters	Administration	Susan Howard	Document Control Administrator	04/12/2013 11:30 AM	86
7.	Corporate Headquarters	Administration	Douglas Johnson	Chief Executive Officer	04/12/2013 11:31 AM	43
8.	Corporate Headquarters	Administration	Douglas Johnson	Chief Executive Officer	04/12/2013 11:32 AM	71
9.	Corporate Headquarters	Administration	Anne Jones	Chief Finance Officer	04/12/2013 11:33 AM	57

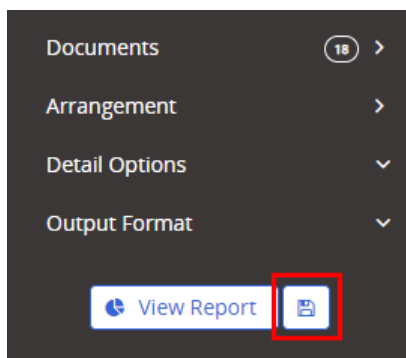
- **Include Graphs:** Adds a graph to the report's **Summary** area. The graph shows the number of users who scored within each of five different score ranges.



6. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.



7. (Optional) To save the current document/questionnaire selections and option settings for future use, click , type a name and description, click **Save and Close**, and then click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

8. 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.

QUESTIONNAIRE RESULTS BY DOCUMENT

Documents > Arrangement > Detail Options > Output Format >

Page 1 of 5

Questionnaire Results by Document

NAVEX Global
Pages: 12
Generated By: Douglas Johnson
Generated: 11/05/2014 14:55

1. Account Collections Form (v.1)

Reference #	1	Questionnaire Version	3	Document Owner	Accounting, Doc Owner
-------------	---	-----------------------	---	----------------	-----------------------

Questionnaire Results

Scores		User Results		User Stats	
Average Score	100%	Average Attempts	1	Assigned Users	4
High Score	100%	Failures	0	Passing Users	1
Median Score	100%	Passed on First Attempt	100%	Users Yet to Pass	3
Low Score	100%				

Numbers include multiple questionnaire completions by a user as well as users not assigned to take questionnaire.

Question Overview (1)

Objective: General Questions
Q1 - I have accepted a gift worth more than \$20.

Answers Times Chosen Percentage

If you selected **Microsoft Excel Raw**, follow the prompts to download and open the Excel file. The exported Excel file contains the following two worksheets: **Summary**, **Question Overview**. If **Include User Results** is selected, two additional worksheets—**Assigned Users** and **User Details**—are included.

	A	B	C	D	E	F	G	H	I	J	K	L	M
	Questionnaire Version	Ref. #	Title (Version)	Version Number	Average Score	High Score	Low Score	Median Score	Passed on First Attempt	Failures	Passing Users	Users Yet to Pass	Assigned Users
1		1	233 Anti-Bribery Policy (v.2)	2	0%	0%	0%	0%	0%	0	0	47	47
2		1	6 Cash Drawers (v.2)	2	60%	100%	0%	100%	57%	4	6	72	78
3		1	249 Document With Attachment	1	0%	0%	0%	0%	0%	0	0	0	0
4		1	251 Driggs Document 2 With	1	75%	100%	0%	100%	67%	1	3	16	19
5		1	295 Family and Medical Leave	1	76%	100%	43%	86%	57%	4	5	14	19

Summary

Question Overview

	A	B	C	D	E	F	G	H	I	J	K	L	M
	Questionnaire Version	Ref. #	Title (Version)	Version Number	Objective	Question ID	Question	Answer ID	Answer	Correct?	Times Chosen	Times Question Answered	
1	2	331	Family and Medical Leave (v.1)	1	1	46	How long must an employee	116	3 months	No	0	1	
2	3	331	Family and Medical Leave (v.1)	1	1	46	How long must an employee	117	6 months	No	0	1	
3	4	331	Family and Medical Leave (v.1)	1	1	46	How long must an employee	118	12 months	Yes	1	1	
4	5	331	Family and Medical Leave (v.1)	1	1	47	Which of the following is not	119	Medical leave	No	0	1	

Summary

Question Overview

Assigned Users

User Details

	A	B	C	D	E	F	G	H	I	J	K	L	M
	Questionnaire Version	Ref. #	Title (Version)	Version	Site	Department	First Name	Last Name	Job Title	Date/Time Taken	Score	Attempt #	
1	2	6	Cash Drawers (v.2)	2	Corporate H	Accounting	Emily	Dickens					
2	3	6	Cash Drawers (v.2)	2	Corporate H	Accounting	Jordan	Cash	Accounts P	05/23/2012 11:25	0%	1	
3	4	6	Cash Drawers (v.2)	2	Corporate H	Accounting	Tawna	Gifford	Accounts R	12/04/2012 10:56	100%	1	
4	5	6	Cash Drawers (v.2)	2	Corporate H	Accounting	Tom	Hansen	Accounting	12/04/2012 11:14	100%	1	
5	6	6	Cash Drawers (v.2)	2	Corporate H	Accounting	Maria	Hill	Receiving				
6	7	6	Cash Drawers (v.2)	2	Corporate H	Accounting	Lucille	Holmes	Accountant				

Summary

Question Overview

Assigned Users

User Details

	Is Required	Unique ID	First Name	Middle Name	Last Name	Job Title	Site	Department	Ref #	Title (Version)	Version Number	Questionnaire Version	Date/Time Taken	Attempt #	Question ID	Question	Answer ID	Answer	Correct?
1	Yes	jcash	Jordan	Cash	AccouCorpAccoi	260	Family and Me	1	1	06/30/2014 15:21	1	21	How long must an emplo	41	12 months	Yes			
2	Yes	jcash	Jordan	Cash	AccouCorpAccoi	260	Family and Me	1	1	07/01/2014 15:21	1	24	Which of the following is	49	Research leave	Yes			
3	No	jcash	Jordan	Cash	AccouCorpAccoi	260	Family and Me	1	1	07/02/2014 15:21	1	5	What is the maximum a	9	12 weeks	No			
4	No	jcash	Jordan	Cash	AccouCorpAccoi	260	Family and Me	1	1	07/03/2014 15:21	1	6	True or false: A victim of	12	True	Yes			
5	No	jcash	Jordan	Cash	AccouCorpAccoi	260	Family and Me	1	1	07/04/2014 15:21	1	3	If you know in advance th	6	Both Human Resourc	Yes			
6	No	jcash	Jordan	Cash	AccouCorpAccoi	260	Family and Me	1	1	07/05/2014 15:21	1	4	If your leave was unfore	8	15	Yes			

Summary

Question Overview

Assigned Users

User Details

Report: Questionnaire Results by User

Important: This report has been superseded by the [next-generation Questionnaire Results by User report](#). Because this report will be removed from PolicyTech in a future release, we strongly recommend using the next-generation reports instead. See [Transitioning to Next-Generation Reports](#) for help.

Description

Shows all questionnaire results for the selected users.

Available to users with the following roles or permissions:

Manager, Report Manager, Administrator

Sample Report:

Questionnaire Results by User

NAVEX Global
powered by policytech

Pages: 2
Generated By: Douglas Johnson
Generated: 10/30/2014 09:18

Questionnaire Results by User

1. Gifford, Tawna (Accounts Receivable Clerk)
Site: Corporate Headquarters
Department: Accounting

Questionnaire Attempts (1)

1. Family and Medical Leave (v.1)				
Ref. #	Date/Time Taken	Score	Attempt #	
331	10/30/2014 07:57	86	1	

Objective: Understand the different types of leave and the eligibility rules.

1. How long must an employee have been employed before being eligible for leave?

Answer Chosen: ✔ 12 months
2. Which of the following is not a recognized leave type for our company?

Answer Chosen: ✔ Research leave
3. What is the maximum amount of time allowed for pregnancy leave?

Answer Chosen: ✔ 12 weeks

Objective: Understand how to apply for a leave.

4. True or false: A victim of a crime can qualify for a leave.

Answer Chosen: ✔ True
5. If you know in advance that you will need a leave, you must contact:

Answer Chosen: ✔ Both Human Resources and your manager
6. If your leave was unforeseeable, you must complete a leave request form within how many days from the start of your leave?

Answer Chosen: ✘ 21
7. True or false: All paperwork pertaining to your leave is placed in your personnel file.

Answer Chosen: ✔ False

2. Family and Medical Leave (v.1)				
Ref. #	Date/Time Taken	Score	Attempt #	
331	10/30/2014 08:00	86	1	

1/2

How to Generate

1. Click **Reports**.
2. Click **Superseded Reports**, and then click **Questionnaire Results by User (Questionnaire Reports)**.
3. Select the users you want included in the report (see [Selecting Users](#) for help).

Users

Site: Corporate Headquarters ☐ Show Archived Users (In Red)

Departments Job Titles Users

Search Users

Assignee Groups

- Multi-Site (Global) Groups
- Corporate Headquarters
 - All Accounting Job Titles
 - All Assignees - Corporate Headquarters
 - All Executive Job Titles
 - All Programming Job Titles
 - Managers

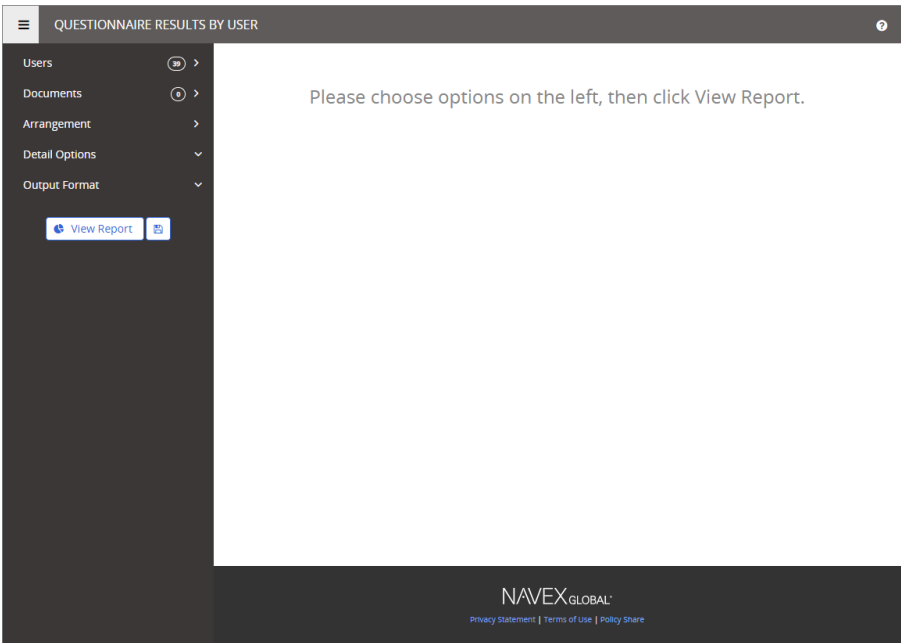
Users (Loading may take several minutes)

Shift+Click selects a span of checkboxes. ⓘ

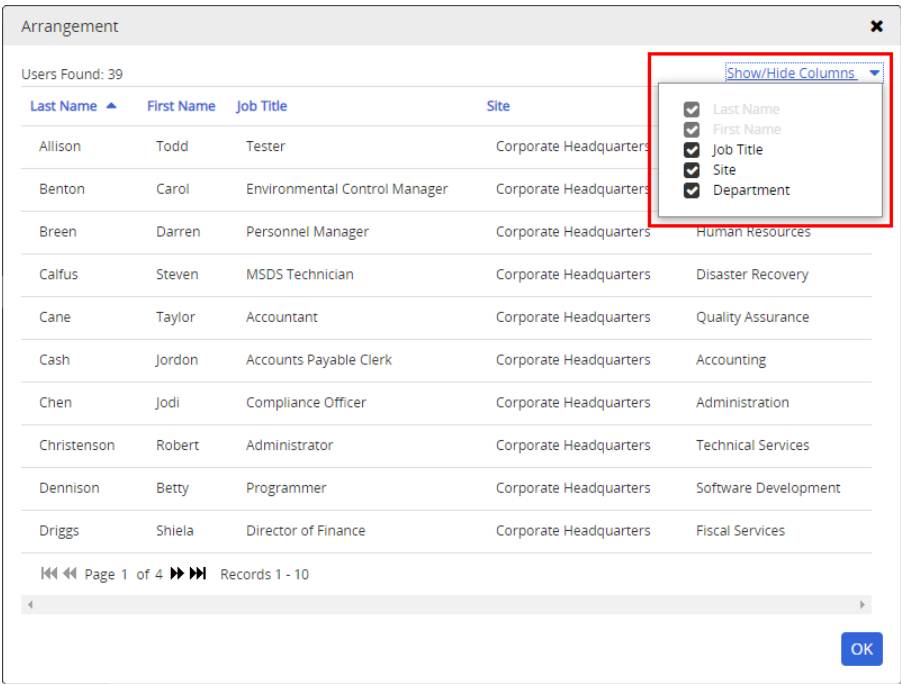
OK

All options available for this report are displayed on the left. Notice that the number of currently selected users is displayed after the **Users** option, which you can click anytime to change your user selection.

Note: If you change your user selection after clicking **View Report**, click **View Report** again to refresh the report contents.

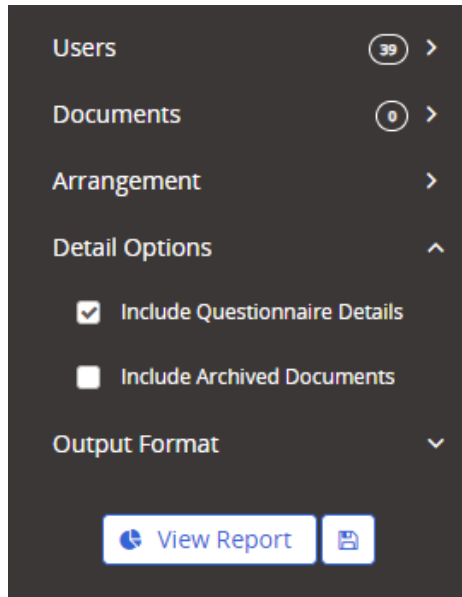


- 4. (Optional) To limit the selected users to only those assigned to specific documents or questionnaires, click **Documents**, and then select documents/questionnaires in the same way as you would for a document-based report (see [Selecting Documents](#) for help)..
- 5. (Optional) Click **Arrangement** 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 user sort order in the report is ascending by last name. To change what the users are sorted by, click a different column heading. Click the same column heading again to reverse the sort order.

6. (Optional) Click **Detail Options**, and then select any of the following:



- **Include Questionnaire Details:** Includes details on each questionnaire question.

1. **Jordon Cash** Accounts Payable Clerk Corporate Headquarters Accounting

Quiz Attempts (3)

1. Family and Medical Leave (v.1)

Ref. #	Date/Time Taken	Score	Attempt #
291	04/12/2013 10:07 AM	57	1

Objective: Understand different types of leave and eligibility rules

- How long must an employee have been employed before being eligible for leave?
 Answer Chosen: 12 months
- Which of the following is not a recognized leave type in our company?
 Answer Chosen: Research sabbatical
- What is the maximum amount of time allowed for pregnancy leave?
 Answer Chosen: 16 weeks
- True or false: A victim of a crime can qualify for a leave.
 Answer Chosen: True

Objective: Understand how to apply for a leave

- If you know you will need leave, you must contact:
 Answer Chosen: Both human resources and your manager
- If your leave was unforeseeable, you must complete a leave request form within how many days from the start of your leave?
 Answer Chosen: 21
- True or false: All paperwork pertaining to your leave is placed in your personnel file.
 Answer Chosen: True

- **Include Archived Documents:** Includes all archived documents with questionnaires and archived stand-alone questionnaires.

7. (Optional) Click **Output Format**, and then click **Standard** or **Microsoft Excel Raw**.

Users 39 >

Documents 0 >



Arrangement >


Detail Options v

Output Format ^

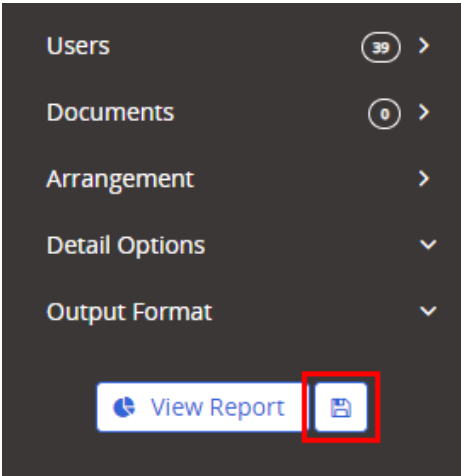
☐ Standard

☒ Microsoft Excel Raw

 View Report 

8. (Optional) To save the current user selections and option settings for future use, click , type a name and description, click **Save and Close**, and then

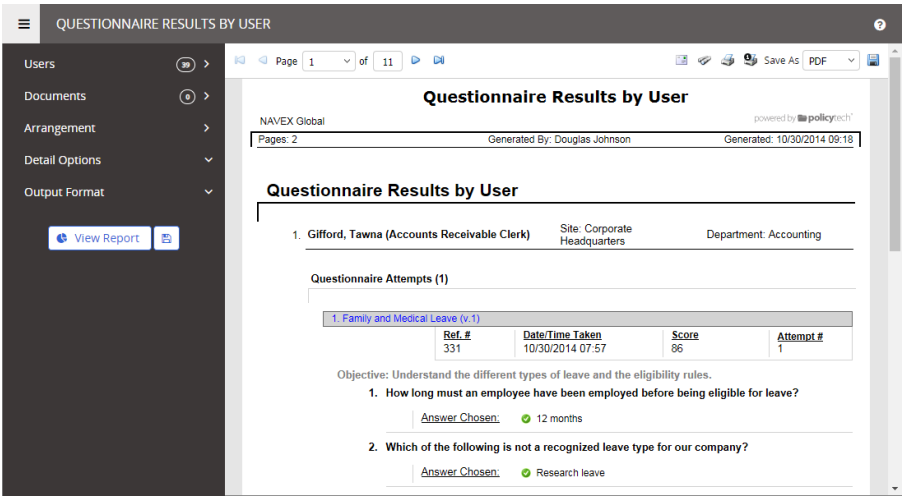
click **OK**.



Note: To access a saved report, click **Reports**, and then click **My Saved Reports**.

9. 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**, follow the prompts to download and open the Excel file.

Unique	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
First	Last	Middle	Job Title	Site	Department	Ref.	Title (Version)	Version	Questionnaire	Date/Time Taken	Score	Objective	Attempt	Question	Question	Answer	Answer	Correct?	Correct?		
ID	Name	Name				#		Number	Version				#	ID		ID					
1	tgifford	Tawna		Gifford Accounti	Corpo	Accounting	331 Family and Me	1	1	10/30/2014 07:57	86%	1	1	39	How long must an empl	96	12 months	Yes	Yes		
2	tgifford	Tawna		Gifford Accounti	Corpo	Accounting	331 Family and Me	1	1	10/30/2014 07:57	86%	2	1	40	Which of the following li	99	Research leave	Yes	Yes		
3	tgifford	Tawna		Gifford Accounti	Corpo	Accounting	331 Family and Me	1	1	10/30/2014 07:57	86%	3	1	41	What is the maximum e	102	12 weeks	Yes	Yes		
4	tgifford	Tawna		Gifford Accounti	Corpo	Accounting	331 Family and Me	1	1	10/30/2014 07:57	86%	1	1	42	True or false. A victim o	105	True	Yes	Yes		
5	tgifford	Tawna		Gifford Accounti	Corpo	Accounting	331 Family and Me	1	1	10/30/2014 07:57	86%	2	1	43	If you know in advance l	109	Both Human Re	Yes	Yes		
6	tgifford	Tawna		Gifford Accounti	Corpo	Accounting	331 Family and Me	1	1	10/30/2014 07:57	86%	3	1	44	If your leave was unfere	112	21	No	No		
H X X Y Sheet1 Sheet2																					

Selecting Documents or Questionnaires

The steps that follow assume that you have already found and opened a document report or selected the **Custom Print** option, and that a window similar to the one below is displayed.

Documents

Content Type

Documents

Status

All Statuses

Site

Corporate Headquarters

Select By

Title

Title

Type here to search by title.

Add All From This Site

Add All From All Sites

Available Documents

Select a document by typing a Title/Reference Number above or changing the Select By criteria.

Selected Documents

Shift+Click selects a span of checkboxes.

Add Filter(s)

Clear Filter(s)

Ok

1. (Conditional) If a **Content Type** option is included, select **Documents** or **Questionnaires**.

Note: Selecting **Questionnaires** limits selectable items for the report to stand-alone questionnaires. The Questionnaire Module is an optional feature that may or may not be currently enabled in your PolicyTech system. (The **Questionnaires** option refers only to stand-alone questionnaires and not to questionnaires added inside a document.)

Documents

Content Type

Documents

Status

Documents

Questionnaires

Site

Corporate Headquarters

Select By

Title

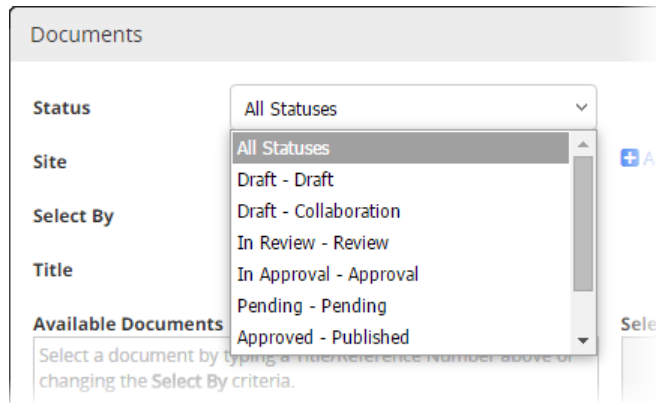
Title

Type here to search by title.

Available Documents

Select a document by typing a Title/Reference Number above or

2. (Conditional) If a **Status** option is included, click the status of the documents or questionnaires you want included in the report or click **All Statuses**.



3. (Conditional) If your PolicyTech system includes multiple sites, select the site containing some or all of the documents/questionnaires you want included in the report.

Notes:

- To select all documents/questionnaires from the current site or from all sites, click **Add All From This Site** or **Add All From All Sites**, and then skip to step 5.
- After completing steps 2 through 6, repeat them to add documents/questionnaires from other sites.

4. In the **Select By** list, click an option for how you want to find documents/questionnaires.

Documents

Status: All Statuses

Site: Corporate Headquarters

Select By: Title

Title

Reference #

Department

Department Group

Template

Document Owner

Writer

Writer Group

Reviewer

Reviewer Group

Approver

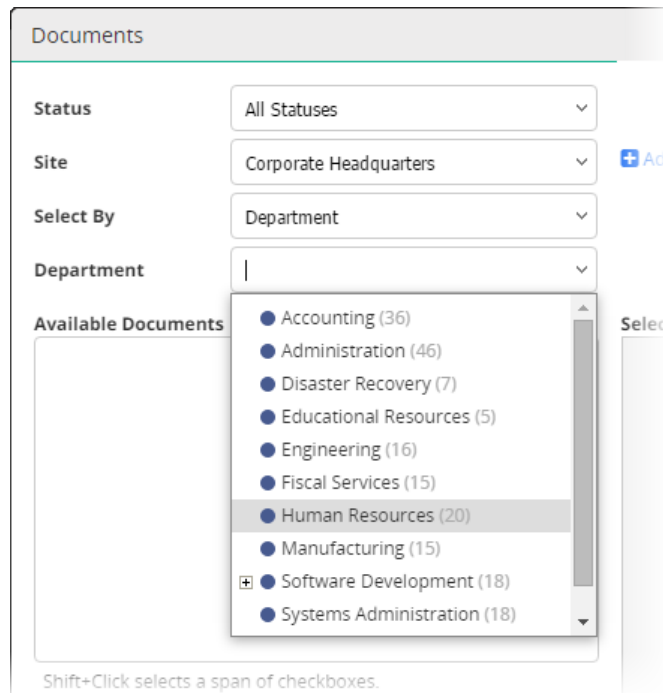
Approver Group

Available Documents

Select a document by clicking on the checkboxes below.

Shift+Click selects a span of checkboxes.

5. The list below **Select By** changes, depending on your **Select By** choice. For example, if you choose to select documents/questionnaires by department, a list of departments appears below the **Select By** list.
 - If you selected **Title** or **Reference #**, move on to step 6.
 - If you chose any of the other **Select By** options, in the list below **Select By** click an item to display all documents/questionnaires assigned to that item. For example, if you chose **Department** for **Select By**, click a department to display all documents/questionnaires assigned to that department.



Documents

Status: All Statuses

Site: Corporate Headquarters

Select By: Department

Department: |

Available Documents:

- Accounting (36)
- Administration (46)
- Disaster Recovery (7)
- Educational Resources (5)
- Engineering (16)
- Fiscal Services (15)
- Human Resources (20)
- Manufacturing (15)
- Software Development (18)
- Systems Administration (18)

Shift+Click selects a span of checkboxes.

6. (Optional) To narrow a long list of available documents/questionnaires, add one or more filters (see [Adding Document Filters](#) below for details).
7. Do one of the following to select documents/questionnaires:
 - If you chose **Title** or **Reference #** for **Select By**, start typing some text that you believe is in a title or reference number. When you've typed at least three characters, a list appears of titles or reference numbers matching what you've typed. Continue typing if you need to narrow the list. As soon as you see the title or reference number you want, click it.

Note: Unlike other **Select By** options, the **Title** and **Reference #** options limit you to selecting documents/questionnaires one at a time.

Documents

Status: All Statuses

Site: Corporate Headquarters [+ Add All From This Site](#)

Select By: Title

Title: cash

Available Documents

Select a document by changing the Select By

- Accounts Payable and Cash Distribution (v.1)
- Cash Drawers (v.1)
- Cash Receipts (v.1)
- Petty Cash (v.1)
- Weekly Financial and Six Week Cash Flow Reports (v.1)

- Select individual documents/questionnaires from the **Available Documents** list.

Documents

Content Type: Documents

Status: All Statuses

Site: Corporate Headquarters [+ Add All From This Site](#) [+ Add All From All Sites](#)

Select By: Department

Department: Accounting [+ Add All From Accounting](#)

Available Documents

- ☐ Account Collection Process (v.1)
- ☒ Account Collection Process (v.2)
- ☒ Account Collections Form (v.1)
- ☐ Accounts Payable and Cash Distribution (v.1)
- ☐ Bad NSF Checks (v.1)
- ☒ Bank Account Reconciliation (v.1)
- ☐ Best Accounting Practices (v.1)
- ☐ Capitalization (v.1)
- ☒ Cash Drawers (v.1)
- ☒ Cash Receipts (v.1)
- ☒ Chart of Accounts (v.1)

Shift+Click selects a span of checkboxes. [+ Add Filter\(s\)](#) [X Clear Filter\(s\)](#)

Selected Documents

Documents

- Account Collection Process (v.2)
- Account Collections Form (v.1)
- Bank Account Reconciliation (v.1)
- Cash Drawers (v.1)
- Cash Receipts (v.1)
- Chart of Accounts (v.1)

Ok

- To quickly add all from the **Available Documents** list, click **Add All From [Select By item]**.

Documents

Content Type: Documents

Status: All Statuses

Site: Corporate Headquarters [+ Add All From This Site](#) [+ Add All From All Sites](#)

Select By: Department

Department: Accounting [+ Add All From Accounting](#)

Available Documents

- ☐ Account Collection Process (v.1)

Selected Documents

Documents

- Click **Add All From This Site**.
- Click **Add All From All Sites**.

Adding Document Filters

1. With a list of documents or questionnaires displayed in the **Available Documents** window, click **Add Filter(s)**.

The screenshot shows a window titled "Documents". It contains several filter sections:

- Content Type:** A dropdown menu with "Documents" selected.
- Status:** A dropdown menu with "All Statuses" selected.
- Site:** A dropdown menu with "Corporate Headquarters" selected, and a "+ Add" button to its right.
- Select By:** A dropdown menu with "Department" selected.
- Department:** A dropdown menu with "Accounting" selected, and a "+ Add" button to its right.

Below these filters is the **Available Documents** section, which lists various documents with checkboxes next to them:

- ☐ Account Collection Process (v.1)
- ☐ Account Collection Process (v.2)
- ☐ Account Collections Form (v.1)
- ☐ Accounts Payable and Cash Distribution (v.1)
- ☐ Bad NSF Checks (v.1)
- ☐ Bank Account Reconciliation (v.1)
- ☐ Best Accounting Practices (v.1)
- ☐ Capitalization (v.1)
- ☐ Cash Drawers (v.1)
- ☐ Cash Receipts (v.1)
- ☐ Chart of Accounts (v.1)

At the bottom of the window, there is a red box around the **+ Add Filter(s)** button. To its right is a **✕ Clear Filter(s)** button. A small text note at the bottom left of the document list says "Shift+Click selects a span of checkboxes."

2. For **Filter By**, click an option.

Important: In some reports, a **Filter By** option is preselected and not changeable.

The screenshot shows a 'Filters' dialog box. At the top, there's a header 'Filters'. Below it, a section titled 'Filter By' contains a dropdown menu. The dropdown is open, showing a list of options: 'Date Created' (highlighted), 'Date Submitted', 'Publication Date', 'Date Approved', 'Next Review Date', 'In Effect', and 'Date Archived'. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Apply'.

3. For **Date Range**, click an option.

The screenshot shows the same 'Filters' dialog box. The 'Filter By' dropdown is now closed and set to 'Date Created'. Below it, a new section titled 'Date Range' contains another dropdown menu. This dropdown is open, showing a list of options: 'Last 30 Days' (highlighted), 'Last 60 Days', 'Last 90 Days', 'Last Month', 'Last Quarter', 'Last 6 Months', 'Last 12 Months', 'Previous Year', and 'Custom Range'. The 'Cancel' and 'Apply' buttons are still visible at the bottom right.

4. Click **Add Filter**.

Filters

Filter By
Date Created

Date Range
Last 30 Days

+ Add Filter

- Remove Selected

Cancel Apply

5. (Optional) Repeat steps 2 through 4 to add another filter to work in combination with the first filter you added. For example, you might want to filter for only those documents/questionnaires that were created within the last 90 days and that were published within the last 30 days.
6. Click **Apply**.

Note: To clear any applied filters, below the **Available Documents** box, click **Clear Filter(s)**.

Selecting Users

The steps that follow assume that you have already found and opened a user report and that you see a window similar to the one of the three windows displayed below. The window you first see when you select a report depends on which report it is.

Some reports show a list of users with a specific role (document owners, writers, reviewers, or approvers).

The screenshot shows a window titled "Users" with a close button (X) in the top right corner. At the top, there is a "Site" dropdown menu set to "Corporate Headquarters" and a checkbox labeled "Show Archived Users (In Red)". Below this, there are three tabs: "Departments", "Job Titles", and "Reviewers", with "Reviewers" being the active tab. A search bar labeled "Search Reviewers" is positioned above a list of "Reviewers". The list contains 15 entries, each with a checkbox and a name followed by a role in parentheses: Allison, Todd (Tester); Benton, Carol (Manager); Breen, Darren (Personnel Manager); Cane, Taylor (Tester); Christenson, Robert (Administrator); Driggs, Shiela (Director of Finance); Ellis, Darcy (Installer); Farnsworth, John (Manager); Gleeson, Edward (Manager); Hansen, Tom (Accounting Manager); Leonard, Lynn (Director of Education); and Oppener, Susie (Director of Purchasing). A scroll bar is on the right side of the list. Below the list, a note states "Shift+Click selects a span of checkboxes." with an information icon (i). To the right of the list is a large, empty rectangular area labeled "Selected Users" with an information icon (i) and a "Contents" button with a trash icon. At the bottom right, there is a blue "OK" button.

Several reports show a list of assignee groups.

The screenshot shows a window titled "Users" with a close button (X) in the top right corner. At the top, there is a "Site" dropdown menu set to "Corporate Headquarters" and a checkbox labeled "Show Archived Users (In Red)". Below this, there are three tabs: "Departments", "Job Titles", and "Assignees", with "Assignees" being the active tab. A search bar labeled "Search Assignees" is positioned above a list of "Assignee Groups". The list contains two main categories: "Multi-Site (Global) Groups" and "Corporate Headquarters". Under "Corporate Headquarters", there are five sub-items, each with a checkbox and a label: "All Accounting Job Titles", "All Assignees - Corporate Headquarters", "All Executive Job Titles", "All Programming Job Titles", and "Managers". A scroll bar is on the right side of the list. Below the list, a note states "Shift+Click selects a span of checkboxes." with an information icon (i). To the right of the list is a large, empty rectangular area labeled "Selected Users" with an information icon (i) and a "Contents" button with a trash icon. At the bottom right, there is a blue "OK" button.

And several reports show the user search tool.

Users

Site: Corporate Headquarters

☒ Show Archived Users (In Red)

Departments Job Titles Users

Search Users

Assignee Groups

- Multi-Site (Global) Groups
- Corporate Headquarters
 - All Accounting Job Titles
 - All Assignees - Corporate Headquarters
 - All Executive Job Titles
 - All Programming Job Titles
 - Managers

Users (Loading may take several minutes)

Shift+Click selects a span of checkboxes.

OK

1. If your PolicyTech system has multiple sites, select the site containing some or all of the users you want included in the report.

Note: After finishing these steps, repeat them to add users from other sites.

Users

Document Roles: All Users

Site: Corporate Headquarters

Corporate Headquarters

Manufacturing

Sales & Support Office

Search Users

2. (Optional) To include archived users in whatever you select next in step 3, select **Show Archived Users**. An example of when this might be useful is when you're running a report for a specific time period, and a user was with the organization during that period but has since left and has been archived.

Users

Roles: All Users

Site: Corporate Headquarters

[Add All From This Site](#) [Add All From All Sites](#)

☒ Show Archived Users (In Red)

Departments Job Titles Users

Search Users

3. Do any of the following:

- On the **Users** tab, start typing text that is anywhere in a user's first or last name. As soon as you see the name, click it.

Note: Unlike the other user selection methods, searching for users limits you to selecting one user at a time.

- On all other tabs (**Writers, Reviewers, Approvers, Assignees, Document Owners, Departments, or Job Titles**), select one or more users, departments or job titles; or click the **Groups** bar and select one or more groups.
- Click **Add All From This Site**.
- Click **Add All From All Sites**.

Transitioning to Next-Generation Reports

The release of PolicyTech version 9.6 introduced the next generation of task reports and the first phase of legacy report replacement, as shown below.

Next-Generation Reports

Legacy Reports

Tasks by Document:

Current
All Tasks

Supersede

Tasks by Document:

In Draft
In Collaboration
In Review
In Approval
In Published
All Workflow Statuses

Tasks by User:

Current
All Tasks

Supersede

Tasks by User:

Document Owner – Resubmit for Review Tasks
Writer Tasks
Reviewer Tasks
Approver Tasks
Reader Tasks
All Workflow Tasks

My Tasks

Supersedes

My Tasks:

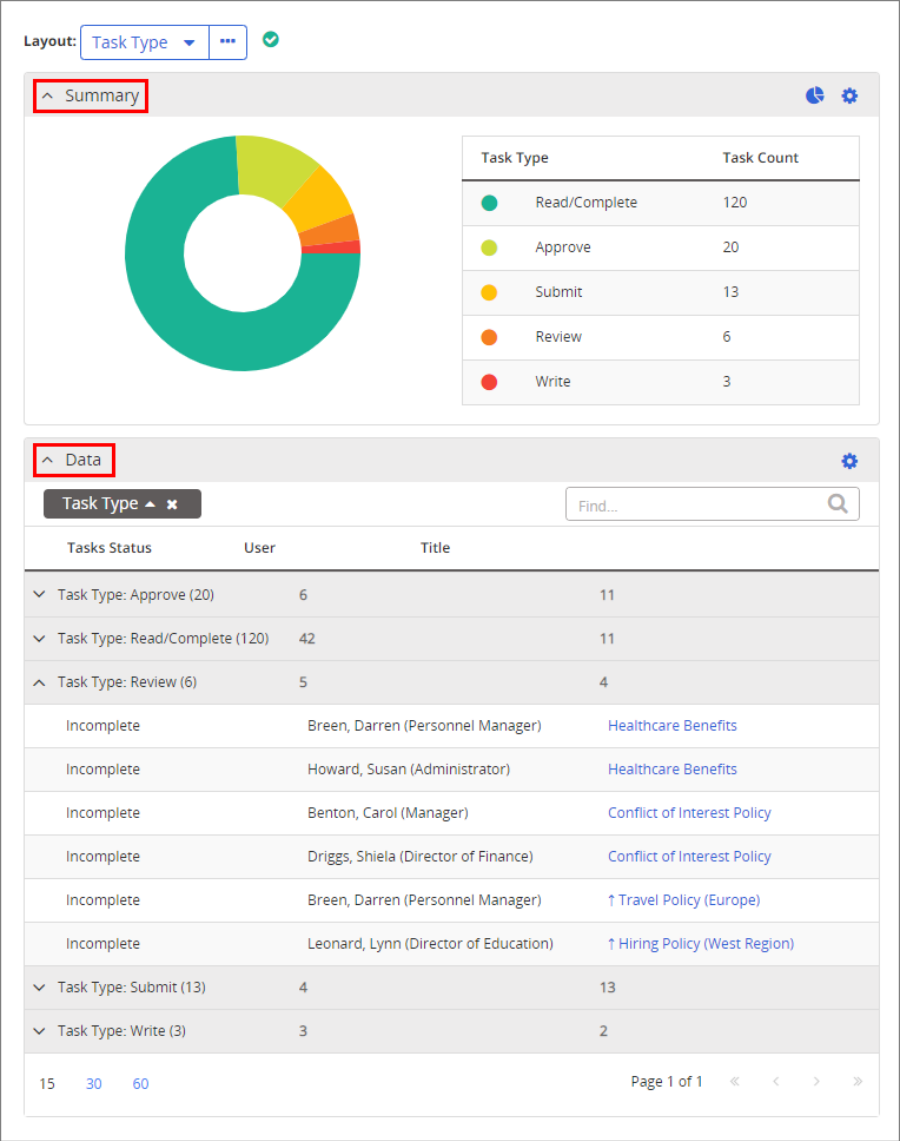
Writer Tasks
Reviewer Tasks
Approver Tasks
Reader Tasks
All Workflow Tasks

Note: Replaced reports will continue to be available for a time in the **Superseded Reports** section.

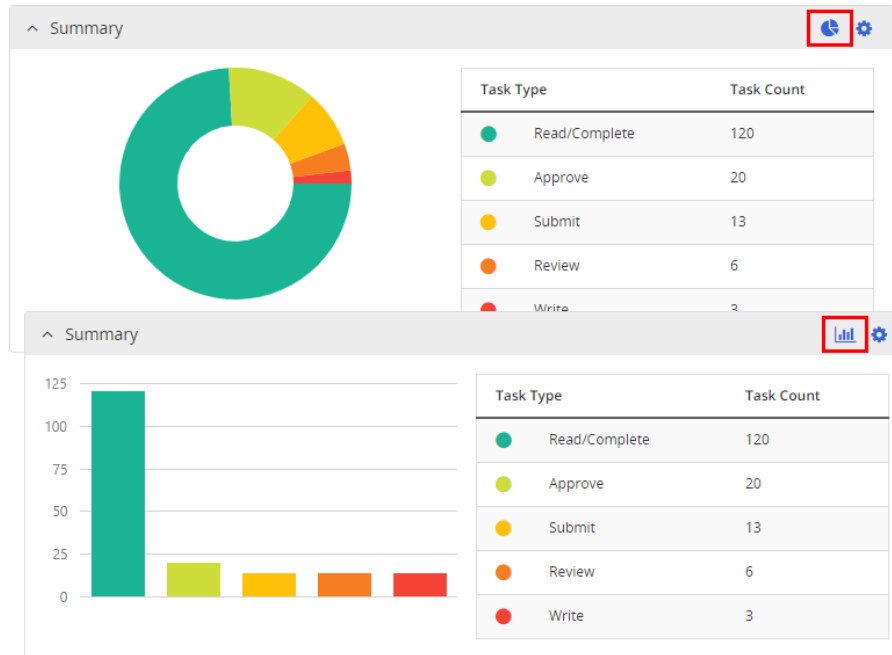
Static vs. Dynamic Report Results

In legacy reports, all report customization and manipulation is done using report settings, with the report results generated as a static document. In next-generation reports, you set a minimum of report options, such as selecting the documents and users to include and adjusting a few basic settings, to generate report results that act as an initial framework.

The results of a next-generation report consist of a **Summary** and a **Data** pane, each of which is dynamically customizable to show precisely the information you need.



In the **Summary** pane, you can select a chart type and click on a chart or table section to immediately filter the results in the **Data** pane.



In legacy reports, the data layout is predefined, and you have a relatively limited number of options for controlling which pieces of data to include and how to arrange them. Next-generation report data is shown in a dynamic grid in which you can size, rearrange, and sort columns, filter column data, and choose from dozens of columns to include, as compared to the two or three optional columns in legacy reports.

The screenshot shows a 'Show/Hide Columns' dialog box with a list of columns and their selection status:

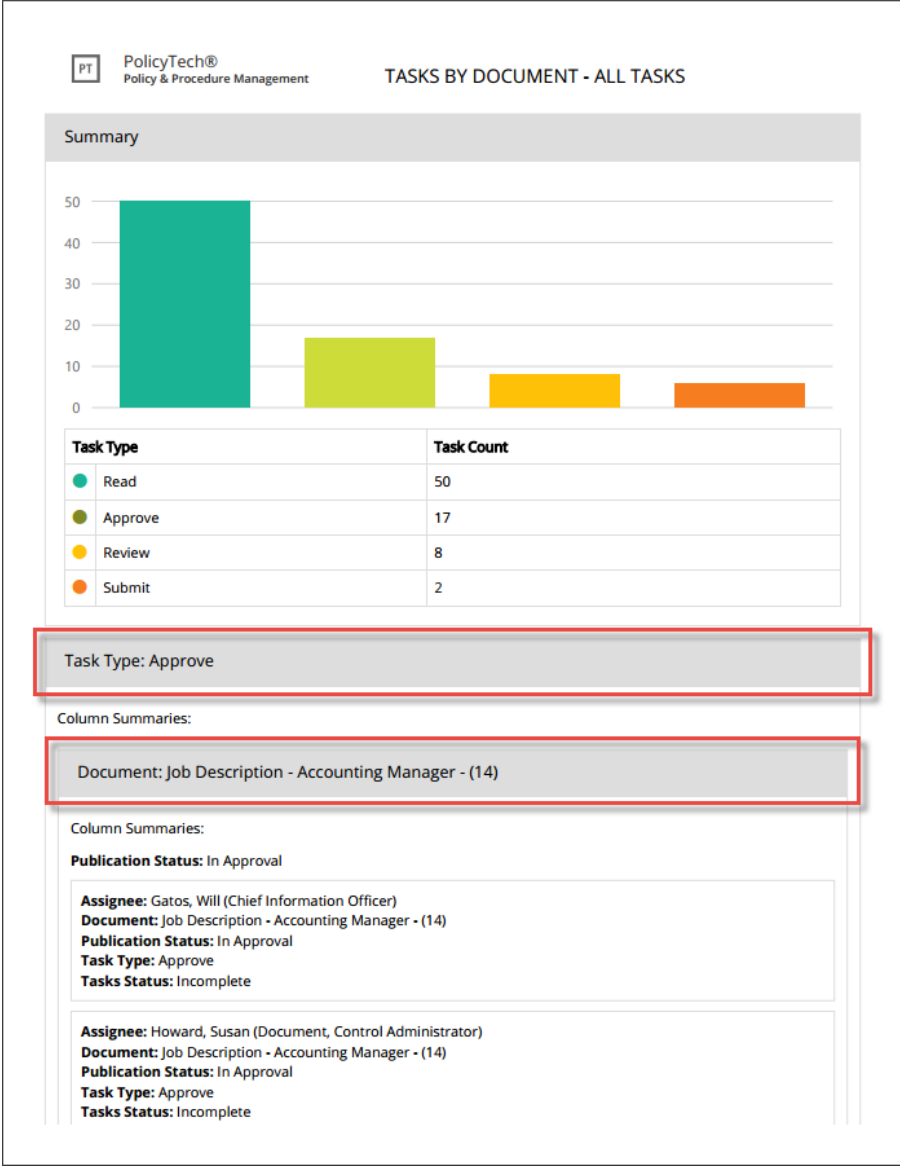
Column Name	Selected
Select All	<input type="checkbox"/>
Assignee	<input checked="" type="checkbox"/>
Assignee Department	<input type="checkbox"/>
Assignee Job Title	<input type="checkbox"/>
Assignee Preferred Language	<input type="checkbox"/>
Assignee Site	<input type="checkbox"/>
Assignee Unique Employee ID	<input type="checkbox"/>
Complete Tasks	<input type="checkbox"/>
Current Cycle	<input type="checkbox"/>
Current Level	<input type="checkbox"/>
Date Assigned	<input type="checkbox"/>
Date Completed	<input checked="" type="checkbox"/>
Date Last Submitted	<input type="checkbox"/>
Days in Current Cycle	<input type="checkbox"/>
Days Until Due	<input type="checkbox"/>
Document	<input checked="" type="checkbox"/>
Document Owner	<input type="checkbox"/>
Document Owner Department	<input type="checkbox"/>
Document Owner Site	<input type="checkbox"/>
Document Owner Unique Employee ID	<input type="checkbox"/>

A blue 'Done' button is located at the bottom right of the dialog.

You can also organize the data into groupings by simply dragging column headings into the grouping bar and then arranging them. For example, you might want to group data first by task assignee, and then by task type, and then by document title. Each grouping becomes an expandable section heading within the **Data** pane.

Data			
Task Type ▲ ✕		Document ▲ ✕	
Task Type	Document	Tasks Status	Publication Status
Approve			
Read			
^ Account Collections Form - (1)			Approved
Read	Account Collections ...	Incomplete	Approved
Read	Account Collections ...	Incomplete	Approved
Read	Account Collections ...	Incomplete	Approved
Read	Account Collections ...	Incomplete	Approved
Read	Account Collections ...	Complete	Approved
▼ Accounts Payable and Cash Distribution - (2)			Approved
▼ Safety Guidelines - (314)			Approved
Review			
Submit			
15	30	60	

The groupings also become sections in the printed or saved report.



Recreating Superseded Report Results in a Next-Generation Report

If you've used superseded reports and want to produce approximately the same results in a next-generation report, refer to the following sections:

[Recreating a Superseded Tasks by Document Report](#)

[Recreating a Superseded Tasks by User Report](#)

[Recreating a Superseded "My Tasks & Questionnaires" Report](#)

Recreating a Superseded Tasks by Document Report

Follow these instructions to recreate any of the following superseded Tasks by Document reports:

- In Draft
 - In Collaboration
 - In Review
 - In Approval
 - In Published
 - All Workflow Statuses
1. Click **Reports**, click **Tasks by Document**, and then click **Tasks by Document - Current**.
 2. In **Select Documents**, for **Status**, select the status corresponding with the title of the legacy report you want to recreate. For example, if you're recreating the In Review report, select **In Review - Review**.

Select Documents

Status: **All Statuses** (dropdown menu open showing: All Statuses, Draft - Draft, Draft - Collaboration, In Review - Review, In Approval - Approval, Pending - Pending, Approved - Published)

Site: **Add All From This Site** **Add All From All Sites**

Select By: **Title**

Available Documents: Select a document by typing in the search box or by changing the Select By criteria.

Selected Documents: (empty list)

Shift+Click selects a span of checkboxes.

Add Filter(s) **Clear Filter(s)**

OK

3. Select documents as you normally would (see [Selecting Documents](#)), and then click **OK**.

Some of the report options have different names than those in the legacy report. Also, some of the options you used to set before viewing the report you'll now set after viewing the report.

4. If you want to limit the documents to only those assigned to specific users, click **Users**, click **Custom Selection**, and then select users as you would for user-based report (see [Selecting Users](#)).

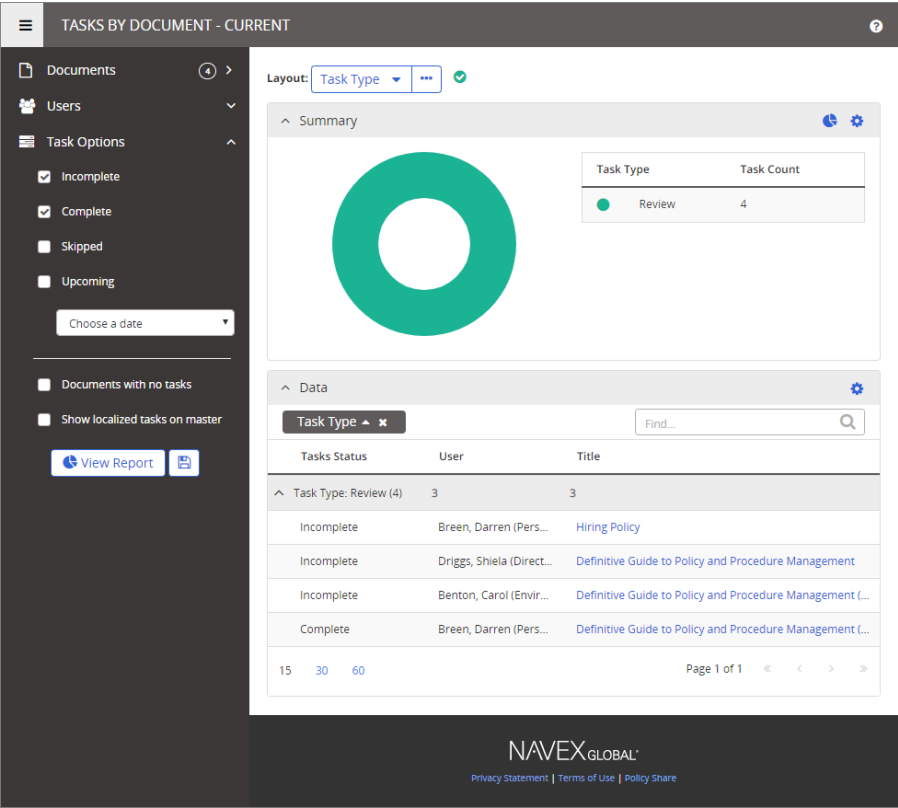
Note: In the legacy report, the **Custom Selection** option for users is under **Detail Options**, under **Include Document Details**.

5. Under **Task Options**, select the types of tasks whose assigned documents you want included in the report.

Notes:

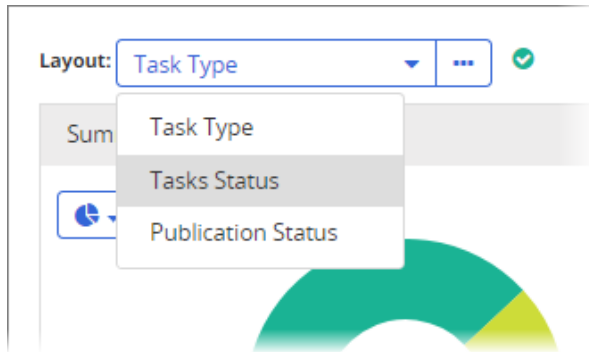
- **Incomplete** and **Complete** are selected by default, whereas, in the legacy report, **Only Incomplete Tasks** is selected by default.
- While there was the **Only Overdue Tasks** option in the legacy report, in this report you can see which tasks are overdue by adding the **Due Status** column to the data grid after clicking **View Report**.
- In the legacy report, if you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, you are given the option of specifying a date range. In this next-generation report, you can specify a date range by applying a **Between** filter to a date column in the **Data** grid after clicking **View Report**.

6. Click **View Report**.



7. For **Layout**, select **Task Status**.

The new **Layout** option determines what type of information appears by default in the **Summary** pane and how the grid is organized and grouped by default in the **Data** pane. For the **Data** pane, The **Task Status** layout groups report data first by document and then by task status, just as in the legacy report.



8. Choose how you want information in the **Summary** pane displayed ([Working with the Summary Pane](#)).


Notes:

- There is no **Include Graphs** option in next-generation reports; the chart portion of the **Summary** pane is always displayed.
- Unlike in the legacy report, the chart in this report is a visual representation of the table data in the **Summary** pane.
- The **Summary** table has been simplified and is different for each **Layout** option.
- Some of the summary table headings in the legacy report are no longer shown in any of this report's **Summary** tables. However, some of the legacy table headings can be added to this next-generation report's **Data** grid using **Show/Hide Columns**.

9. Customize the **Data** grid to show only the data you need in the way you want it represented ([Working with the Data Pane](#)).

Notes:

- Much of the summary information shown in the legacy report below each document title can be added to this report's **Data** grid using **Show/Hide Columns**.
- The default task columns in the legacy report are not the same as those in this report's **Data** grid. Use **Show/Hide Columns** to select the columns you want in the report.

10. (Optional) To save all of the report's current document and user selections, option settings, and customizations for future use, click , type a name and description, and then click **OK**.

11. (Optional) Print or save the current report results (see [Printing or Saving Report Results](#)).

Recreating a Superseded Tasks by User Report

Follow these instructions to recreate any of the following superseded Tasks by User reports:

- Writer Tasks
- Reviewer Tasks
- Approver Tasks
- Reader Tasks
- Document Owner - Resubmit for Review Tasks
- All Workflow Tasks

1. Click **Reports**, click **Tasks by User**, and then click **Tasks by User - Current**.
2. Select users as you normally would (see [Selecting Users](#)), and then click **OK**.

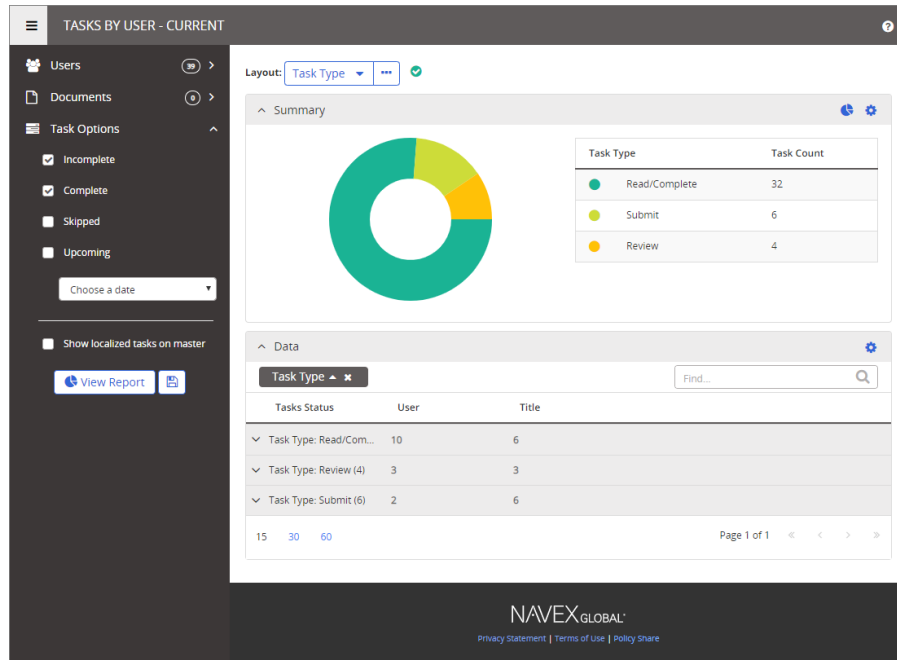
Some of the report options have different names than those in the legacy report. Also, some of the options you used to set before viewing the report you'll now set after viewing the report.

3. If you want to limit the users to only those assigned to specific documents, click **Documents**, and then select documents as you would for document-based report (see [Selecting Documents](#)).
4. Under **Task Options**, select the types of tasks whose assigned users you want included in the report.

Notes:

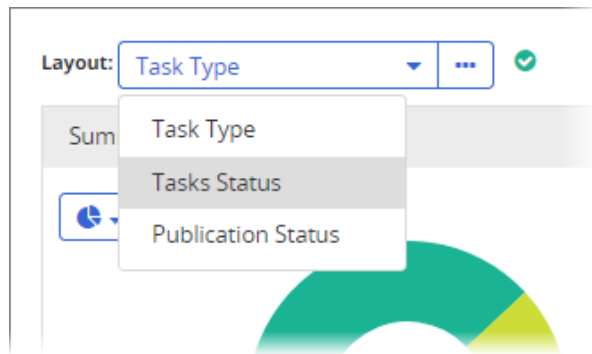
- **Incomplete** and **Complete** are selected by default, whereas, in the legacy report, **Only Incomplete Tasks** is selected by default.
- While there was the **Only Overdue Tasks** option in the legacy report, in this report you can see which tasks are overdue by adding the **Due Status** column to the data grid after clicking **View Report**.
- In the legacy report, if you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, you are given the option of specifying a date range. In this next-generation report, you can specify a date range by applying a **Between** filter to a date column in the **Data** grid after clicking **View Report**.

5. Click **View Report**.



6. For **Layout**, select **Task Status**.

The new **Layout** option determines what type of information appears by default in the **Summary** pane and how the grid is organized and grouped by default in the **Data** pane. For the **Data** pane, The **Task Status** layout groups report data first by assignee and then by task status, just as in the legacy report.



7. Choose how you want information in the **Summary** pane displayed ([Working with the Summary Pane](#)).


Notes:

- There is no **Include Graphs** option in next-generation reports; the chart portion of the **Summary** pane is always displayed.
- Unlike in the legacy report, the chart in this report is a visual representation of the table data in the **Summary** pane.
- The **Summary** table has been simplified and is different for each **Layout** option.

- Some of the summary table headings in the legacy report are no longer shown in any of this report's **Summary** tables. However, some of the legacy table headings can be added to this next-generation report's **Data** grid using **Show/Hide Columns**.

8. Customize the **Data** grid to show only the data you need in the way you want it represented ([Working with the Data Pane](#)).

Notes: The default task columns in the legacy report are not the same as those in this report's **Data** grid. Use **Show/Hide Columns** to select the columns you want in the report.

9. (Optional) To save all of the report's current document and user selections, option settings, and customizations for future use, click , type a name and description, and then click **OK**.
10. (Optional) Print or save the current report results (see [Printing or Saving Report Results](#)).

Recreating a Superseded "My Tasks & Questionnaires" Report

Follow these instructions to recreate any of the following superseded Tasks by User reports:

- Writer Tasks
- Reviewer Tasks
- Approver Tasks
- Reader Tasks
- All Workflow Tasks

1. Click **Reports**, click **My Tasks & Questionnaires**, and then click **My Tasks**.

Some of the report options have different names than those in the legacy report. Also, some of the options you used to set before viewing the report you'll now set after viewing the report.

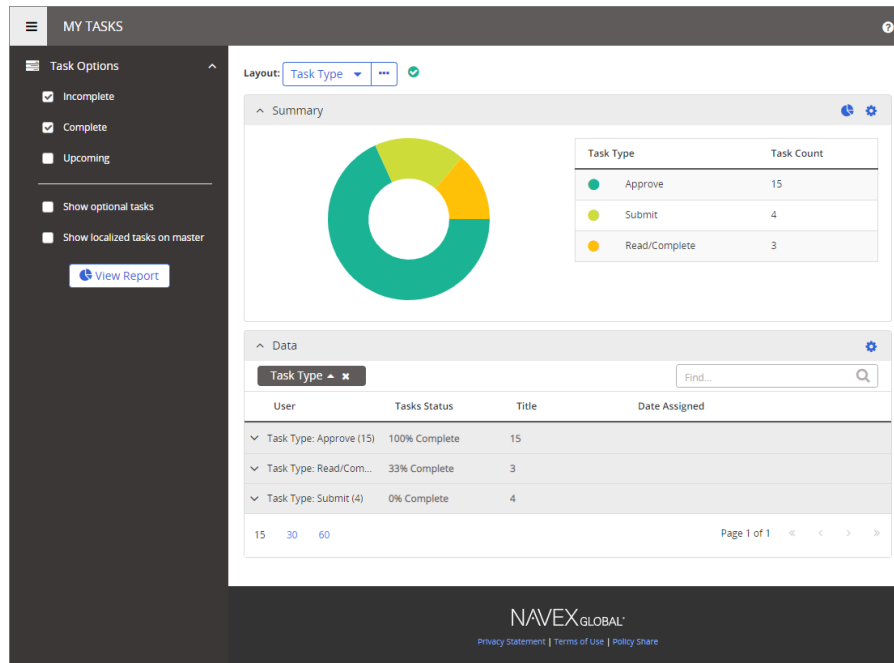
2. Under **Task Options**, select the types of tasks whose assigned users you want included in the report.

Notes:

- **Incomplete** and **Complete** are selected by default, whereas, in the legacy report, **Only Incomplete Tasks** is selected by default.
- While there was the **Only Overdue Tasks** option in the legacy report, in this report you can see which tasks are overdue by adding the **Due Status** column to the data grid after clicking **View Report**.

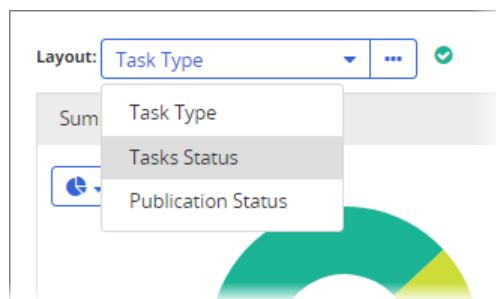
- In the legacy report, if you select **Only Complete Tasks** or **Incomplete and Complete Tasks**, you are given the option of specifying a date range. In this next-generation report, you can specify a date range by applying a **Between** filter to a date column in the **Data** grid after clicking **View Report**.

3. Click **View Report**.



4. For **Layout**, select **Task Status**.

The new **Layout** option determines what type of information appears by default in the **Summary** pane and how the grid is organized and grouped by default in the **Data** pane. For the **Data** pane, The **Task Status** layout groups report data by task status, just as in the legacy report.




5. Choose how you want information in the **Summary** pane displayed ([Working with the Summary Pane](#)).

Notes:

- There is no **Include Graphs** option in next-generation reports; the chart portion of the **Summary** pane is always displayed.
- Unlike in the legacy report, the chart in this report is a visual representation of the table data in the **Summary** pane.
- The **Summary** table has been simplified and is different for each **Layout** option.
- Some of the summary table headings in the legacy report are no longer shown in any of this report's **Summary** tables. However, some of the legacy table headings can be added to this next-generation report's **Data** grid using **Show/Hide Columns**.

6. Customize the **Data** grid to show only the data you need in the way you want it represented ([Working with the Data Pane](#)).

Notes: The default task columns in the legacy report are not the same as those in this report's **Data** grid. Use **Show/Hide Columns** to select the columns you want in the report.

7. (Optional) To save all of the report's current document and user selections, option settings, and customizations for future use, click , type a name and description, and then click **OK**.
8. (Optional) Print or save the current report results (see [Printing or Saving Report Results](#)).

Working with Next-Generation Report Results

Important: This section is for working with the results of the following next-generation, dynamic grid reports:

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

For help with any other report, see [Working with a Finished Legacy Report](#).

Once you've generated a report (clicked **View Report**), you can customize and use the report results in the following ways.

[Working with Report Layouts](#)

[Working with the Summary Pane](#)

[Working with the Data Pane](#)

[Exporting Report Results](#)

[Printing or Saving a Report](#)

Working with Report Layouts

A layout is a set of default filters, data column arrangements, groupings, and summary representations that focus on a particular aspect of the task data. Layouts apply to both the **Summary** and **Data** panes.

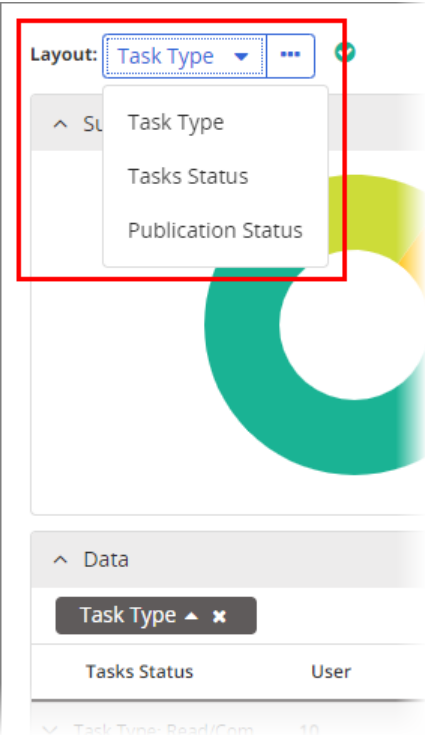
You can select a preset system layout or create and save a custom layout.

Selecting a System Layout Option

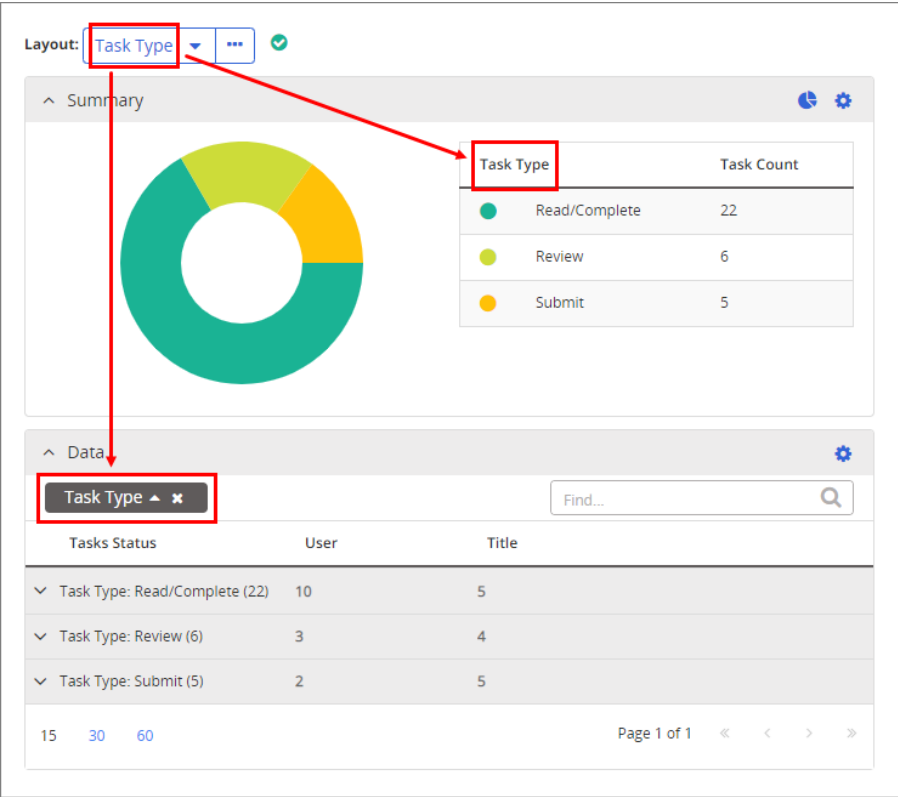
The available standard layouts depend on the type of report you're working with—a task report or a questionnaire report.

Task Report Layouts

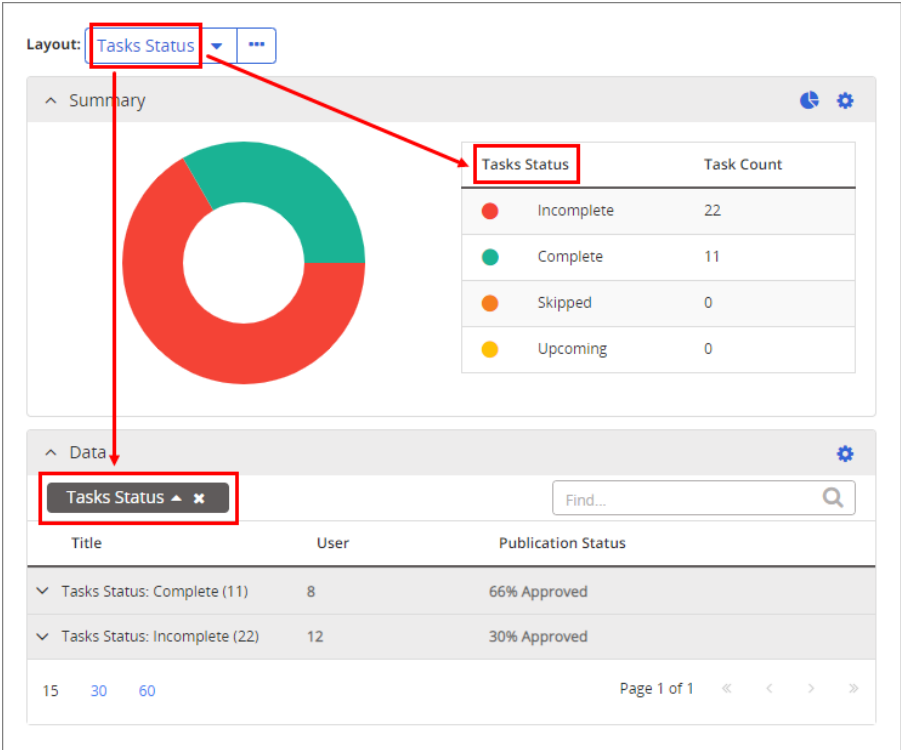
With report results displayed, for **Layout**, click **Task Type**, **Task Status**, or **Publication Status**.



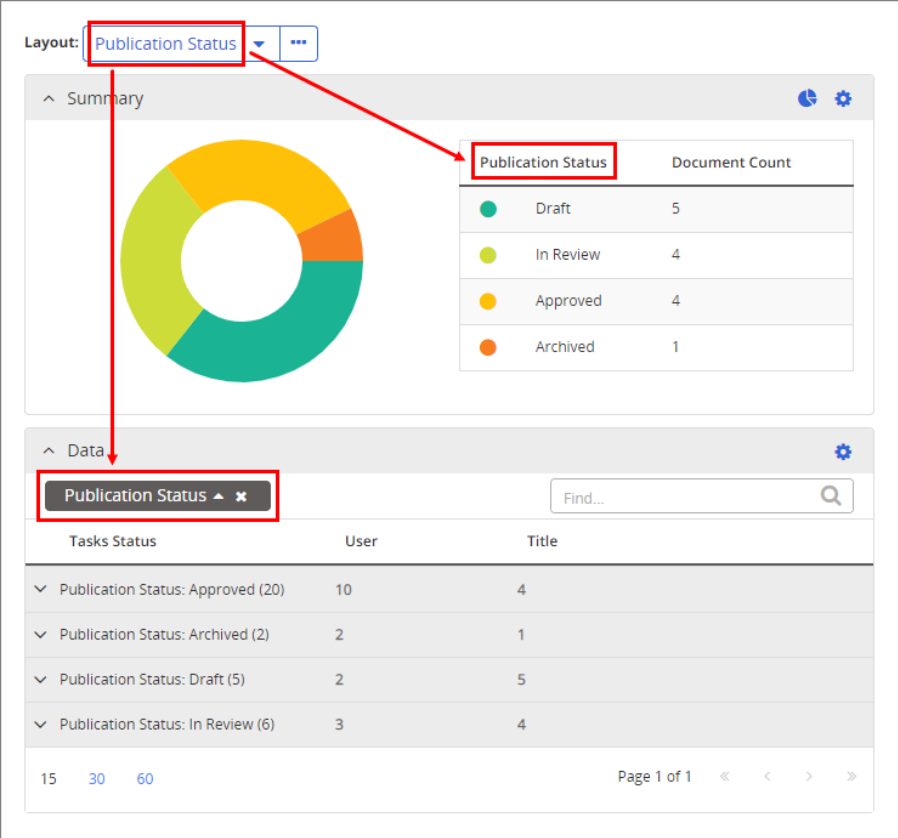
Task Type organizes and represents data primarily by the types of tasks—such as Read/Complete, Review, and Approve—assigned to the selected documents/questionnaires or users.



Task Status organizes and represents data primarily by whether the assigned tasks are incomplete or complete.



Publication Status organizes and represents data primarily by the workflow status—Draft, Collaboration, Review, Approval, Pending, Approved, and Archived—the selected documents/questionnaires or active user tasks are in.



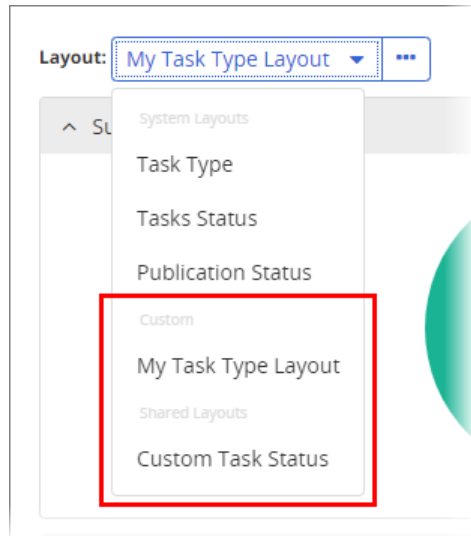
Questionnaire Report Layouts

The layouts available in questionnaire reports vary by report. See the following sections for details on each available standard layout:


- [Questionnaire Results by Document](#)
- [Questionnaire Results by User](#)
- [Questionnaire Statistics](#)

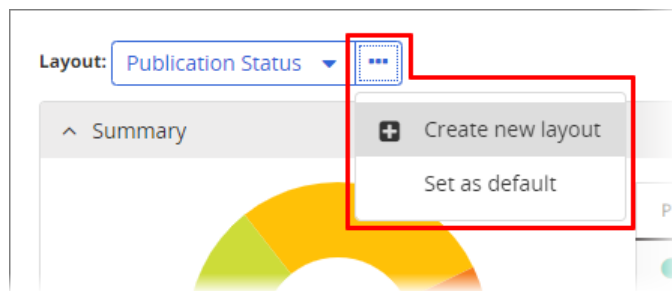
Selecting a Custom or Shared Report Layout

You can also select a report layout you previously saved (see [Creating a Custom Report Layout](#)) or one that another user has saved and shared. Layouts you save appear in the **Custom** area of the **Layout** menu, and layouts others have saved and shared appear in the **Shared Layouts** area.



Creating a Custom Report Layout

1. After clicking **View Report**, use any available customization options in both the **Summary** pane (see [Working with the Summary Pane](#)) and **Data** pane (see [Working with the Data Pane](#)) of task reports or in the **Data** pane (see [Working with the Data Pane](#)) of questionnaire reports to create the report layout.
2. To the right of the **Layout** menu, click , and then click **Create new layout**.



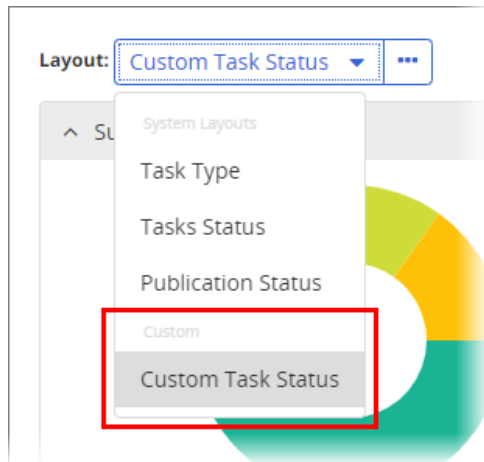
3. Type a layout name.

 A screenshot of a dialog box titled 'Custom Layout Name'. It contains a text input field for the layout name. Below the input field is a checkbox labeled 'Make this layout available to other users', which is currently unchecked. At the bottom of the dialog are two buttons: 'Cancel' and 'OK'.

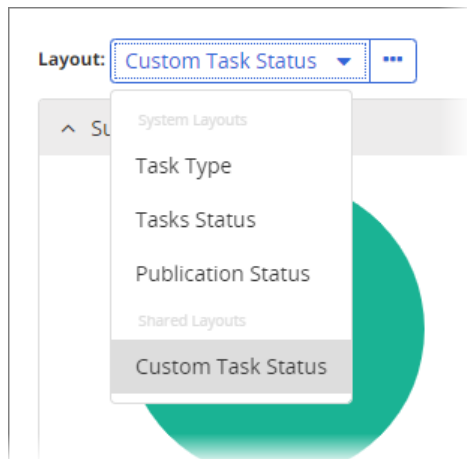
4. (Optional) To enable other report users to select this layout, select **Make this layout available to other users**.

5. Click **OK**.


Your custom layout now appears as an option in the **Custom** area of the **Layout** menu.

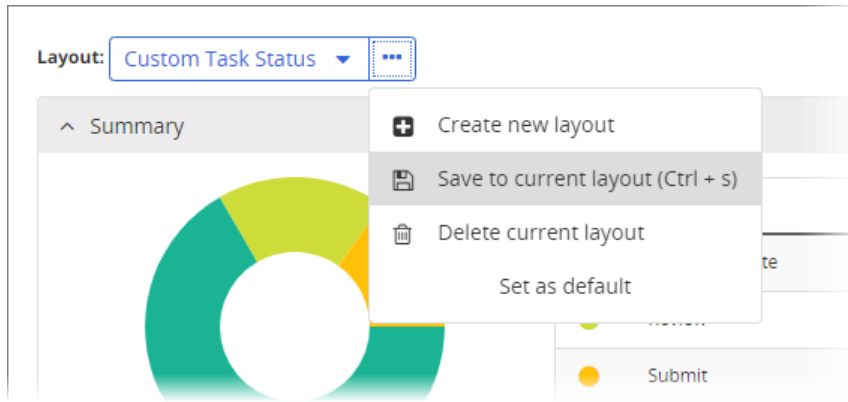



If you selected **Make this layout available to other users**, other users will see the layout in the **Shared Layouts** area of the **Layout** menu.



Modifying or Deleting a Custom Report Layout


1. For **Layout**, select the custom layout you want to modify or delete.
2. Do one of the following:
 - Make modifications to the **Summary** and **Data** pane layouts. Then, to the right of the **Layout** menu, click , and then click **Save to current layout**.

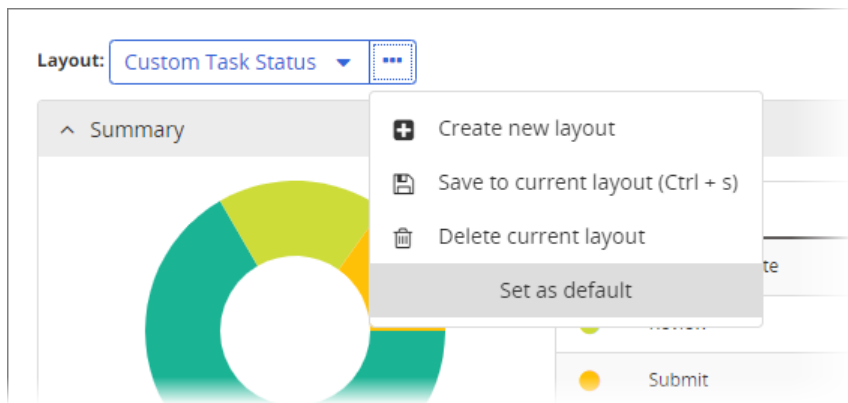


- To the right of the **Layout** menu, click , and then click **Delete current layout**.

Setting a Default Report Layout

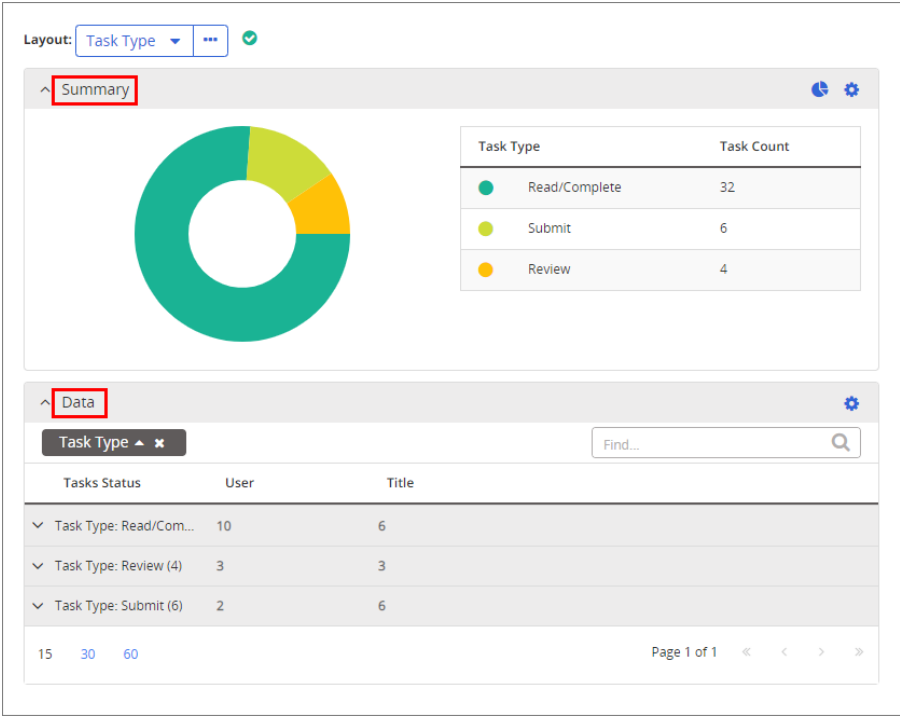
The default layout is the one that will be applied each time in the future you open this report and click **View Report** the first time.

1. For **Layout**, select the system or custom layout you want to set as this report's default.
2. To the right of the **Layout** menu, click , and then click **Set as default**.



Working with the Summary Pane



When you click **View Report** in a next-generation tasks report, the results are displayed in two major divisions called the **Summary** pane and the **Data** pane.

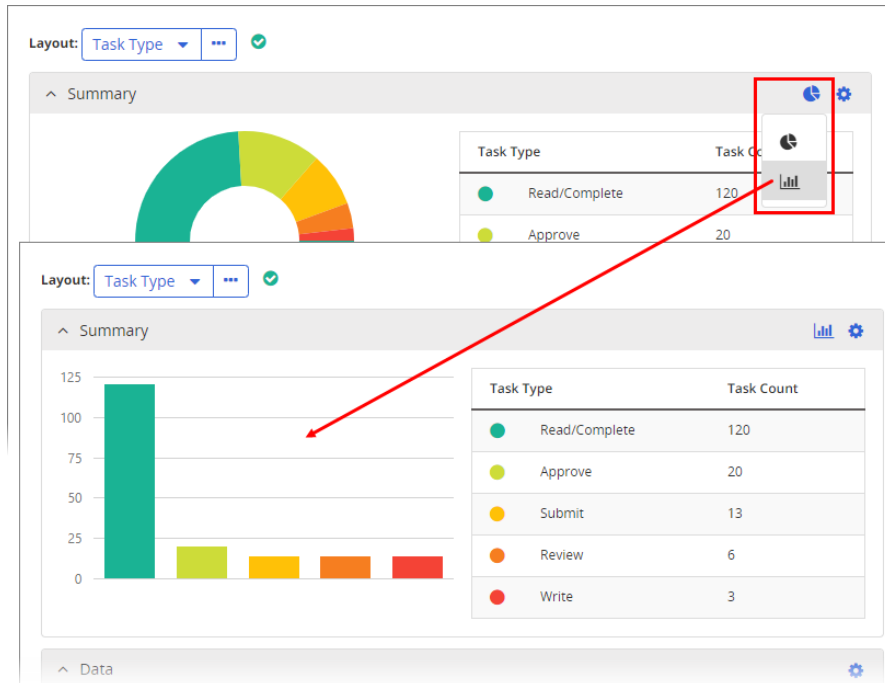



The **Summary** pane contains a chart and a table of data pertaining to the current report layout (see [Working with Report Layouts](#)). You can modify or use the **Summary** pane in the following ways.

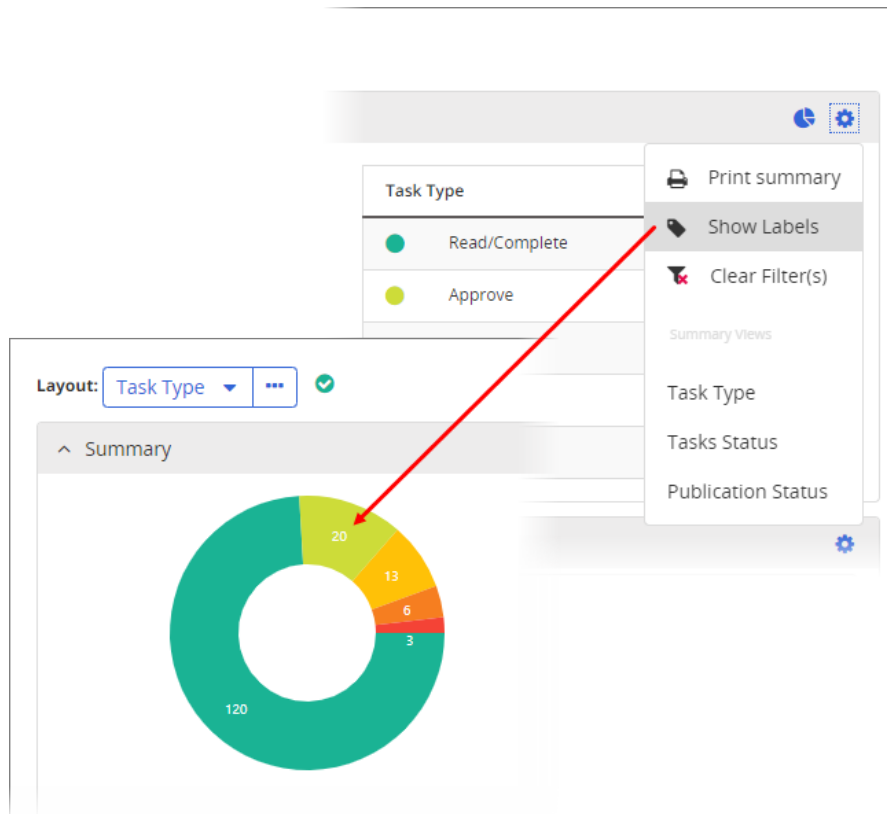
Note: You can save changes you make to the **Summary** and **Data** panes by creating a custom layout (see [Working with Report Layouts](#)).

Changing the Chart Type and View

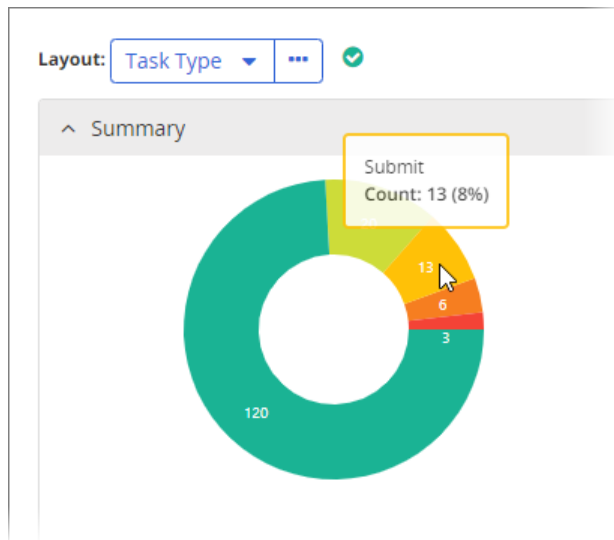
A stylized pie chart is displayed by default. To change to a bar chart, click , and then click .




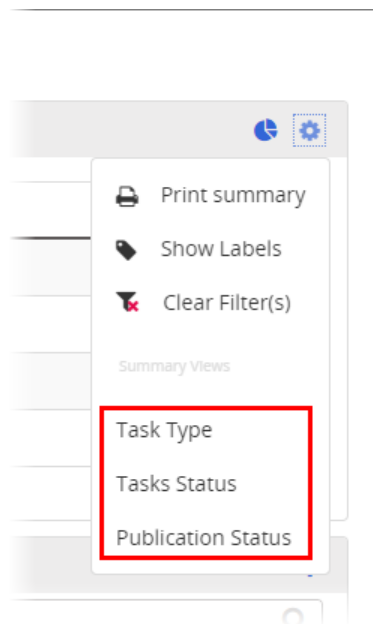
To show labels on chart elements, in the **Summary** pane header, click , and then click **Show Labels**.



To see the details behind a chart element, simply point to it.

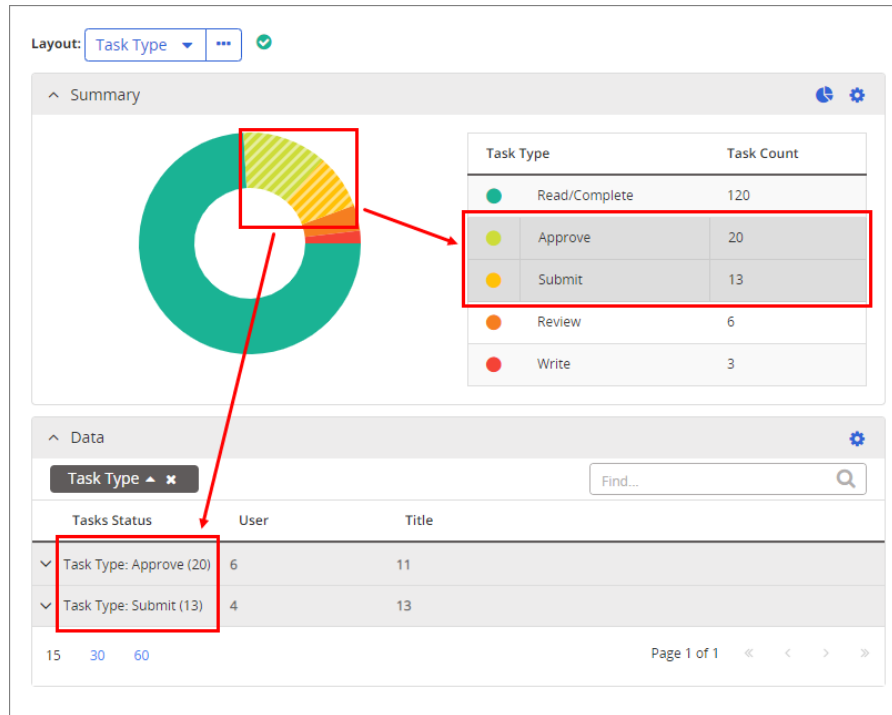


The default or current **Layout** selection determines which Summary and Data pane views are displayed (see [Working with Report Layouts](#)). To change the Summary view without changing the current Data pane layout, in the **Summary** pane header, click , and then click a view.

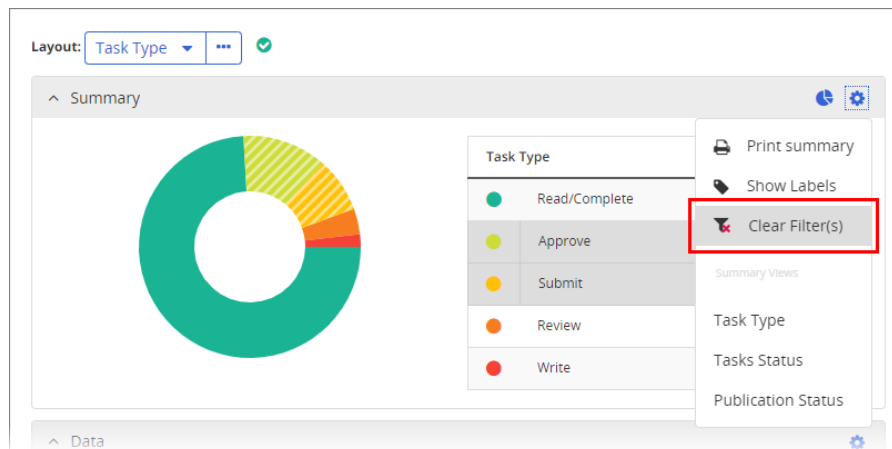


Filtering by Chart or Table Element


Click a chart or table element to show only that type or status in the **Data** pane. To filter by multiple types or statuses, hold down the Ctrl key while you click chart or table elements.

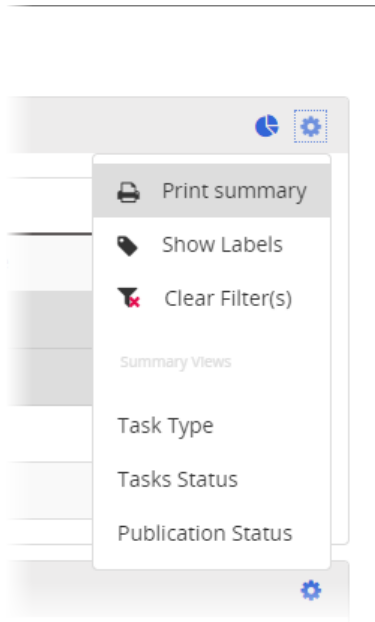


To clear a chart or table filter when only one is selected, click the selected element. To clear multiple selected filters at once, in the **Summary** pane header, click , and then click **Clear Filters**.



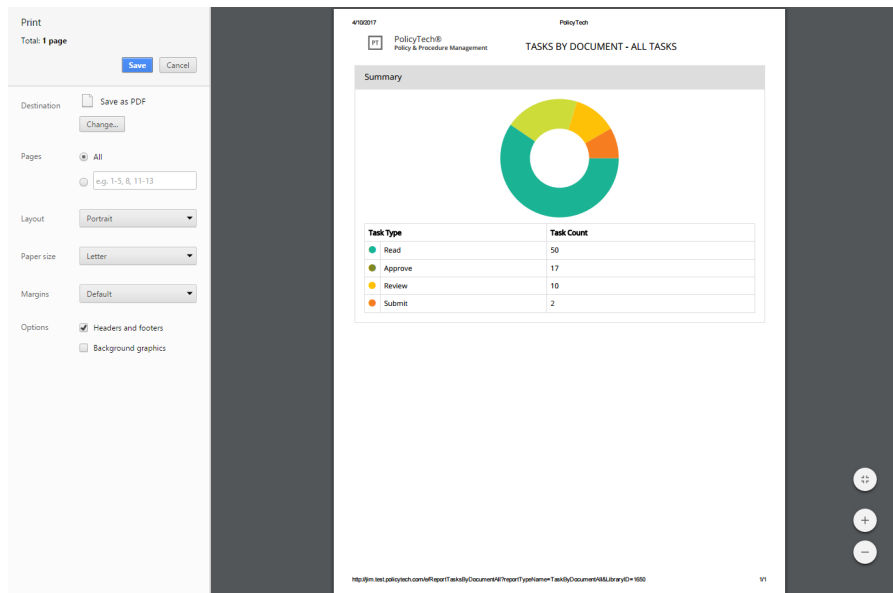
Printing or Saving a Report Summary

1. To print only the Summary pane of a report, in the **Summary** pane header, click , and then click a **Print summary**.



2. For **Destination**, click **Change**, and then do one of the following:

- Select a printer.
- Select **Save as PDF**.



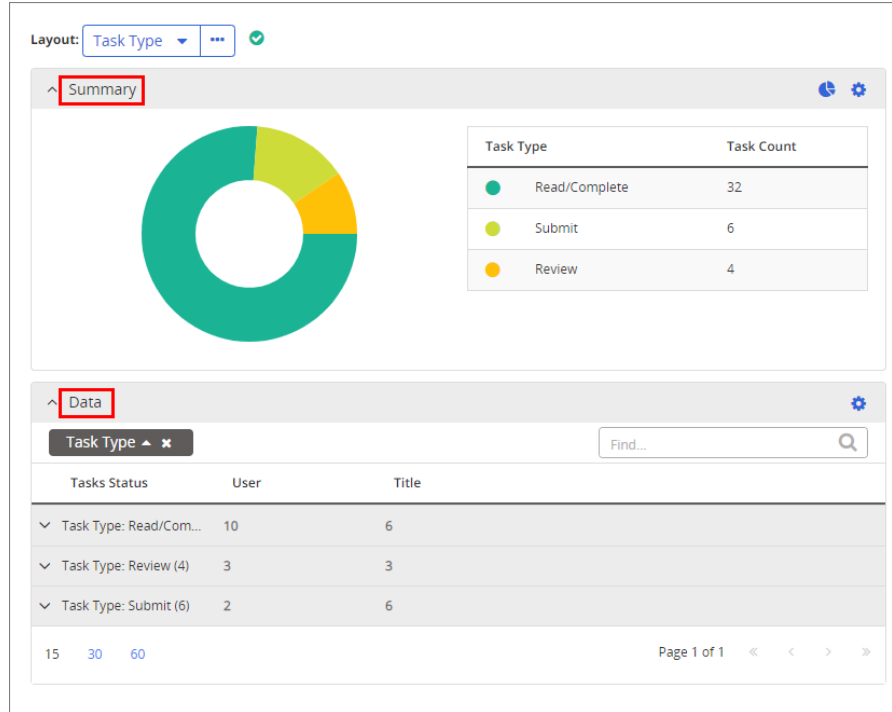
3. Adjust the other print settings as necessary.

4. Do one of the following:

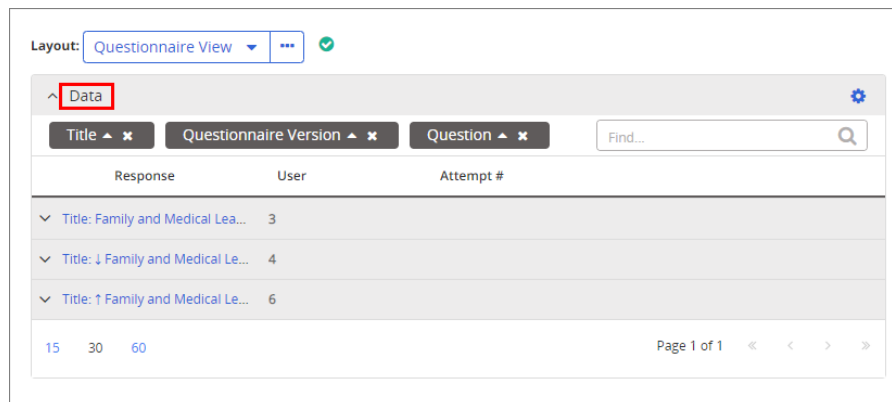
- If a printer is the currently selected destination, click **Print**.
- If **Save as PDF** is the currently selected destination, click **Save**, and then follow the prompts.

Working with the Data Pane

When you click **View Report** in a next-generation tasks report, the results are displayed in two major divisions called the **Summary** pane and the **Data** pane.



When you click **View Report** in a next-generation questionnaire report, the results are displayed in a data pane only.



The **Data** pane contains a grid of data pertaining to the current report layout (see [Working with Report Layouts](#)). You can modify or use the **Data** pane in the following ways.

Note: You can save changes you make to the **Summary** and **Data** panes by creating a custom layout (see [Working with Report Layouts](#)).

[Grouping by Column Data](#)

[Working with Columns](#)

[Exporting Report Results](#)

[Printing Report Results](#)

Grouping by Data Column

Each column in the Data pane represents a specific type of data, called a field, in the PolicyTech database. Grouping is a way of organizing report data by one or more columns. For example, grouping by the Title column makes each top-level grid row represent a document or questionnaire title, while grouping by the User column makes each top-level row represent a user assigned a task.

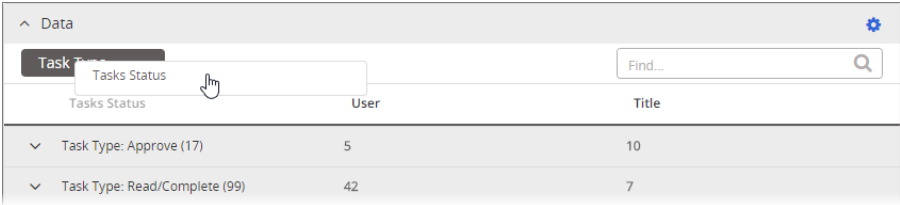
Document Grouping

Data		
Title	Find...	
Task Type	Tasks Status	User
Title: Account Collection Process - (355) (18)	37% Complete	13
Title: Account Collection Process - (358) (2)	0% Complete	1
Title: Account Collection Process - (52) (1)	100% Complete	1
Title: Account Collections Form - (1) (43)	6% Complete	43
Title: Accounts Payable and Cash Distribution - (2) (7)	0% Complete	7




User Grouping

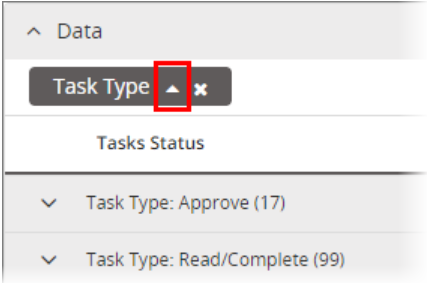
Data		
User	Find...	
Task Type	Tasks Status	Title
User: Cash, Jordon (Accounts Payable Clerk) (4)	25% Complete	4
User: Chen, Jodi (Compliance Officer) (3)	66% Complete	3
User: Johnson, Douglas (Chief Executive Officer) (6)	16% Complete	6
User: Jones, Anne (Chief Finance Officer) (4)	50% Complete	4
User: Woo, Josh (Accountant) (3)	33% Complete	3

You can think of a grouping row as a section heading with a list of relevant data rows below it. You reveal the rows in a grouping by clicking (expanding) the grouping heading.



Tasks Status	User	Title
Task Type: Approve (17)	5	10
Task Type: Read/Complete (99)	42	7

To remove a grouping and add it back into the grid as a column, click . By default, a grouping headings are sorted alphanumerically from least to greatest. To change the sort order, click  or .




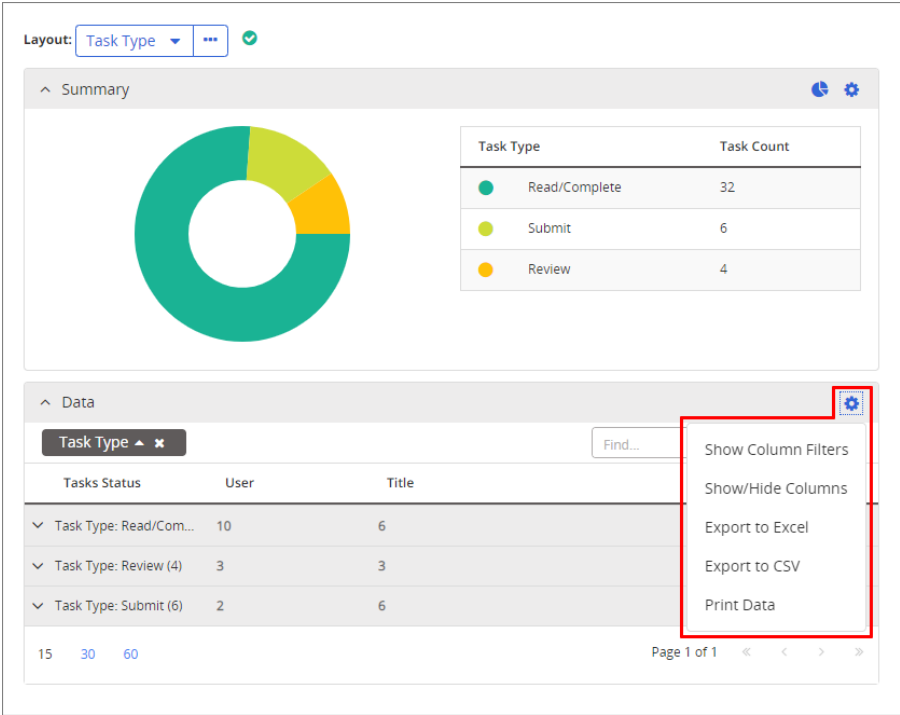
Tasks Status
Task Type: Approve (17)
Task Type: Read/Complete (99)

Working with Data Pane Columns

The default columns and their arrangement are determined by the report type and the currently selected layout (see [Working with Report Layouts](#)).

Showing and Hiding Columns

1. In the **Data** pane header, click , and then click **Show/Hide Columns**.



Layout: Task Type

Summary

Task Type

Task Type	Task Count
Read/Complete	32
Submit	6
Review	4

Data

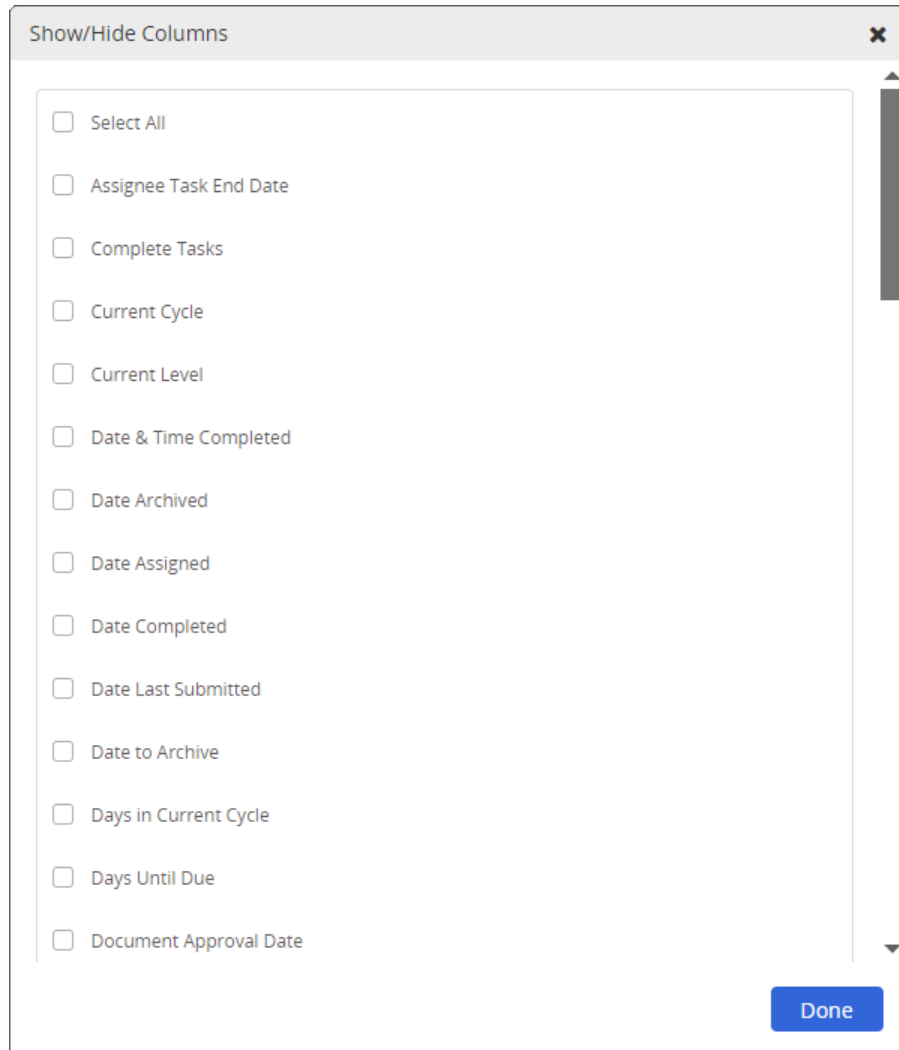
Tasks Status	User	Title
Task Type: Read/Com...	10	6
Task Type: Review (4)	3	3
Task Type: Submit (6)	2	6

15 30 60

Page 1 of 1

- Show Column Filters
- Show/Hide Columns
- Export to Excel
- Export to CSV
- Print Data

2. Select or click to clear column check boxes, and then click **Done**.



Show/Hide Columns

- ☐ Select All
- ☐ Assignee Task End Date
- ☐ Complete Tasks
- ☐ Current Cycle
- ☐ Current Level
- ☐ Date & Time Completed
- ☐ Date Archived
- ☐ Date Assigned
- ☐ Date Completed
- ☐ Date Last Submitted
- ☐ Date to Archive
- ☐ Days in Current Cycle
- ☐ Days Until Due
- ☐ Document Approval Date

Done

Arranging and Sorting Columns

To change column order, drag a column to a different position.

Note: Columns currently selected as groupings (see [Grouping by Column Data](#)) are locked in place and cannot be rearranged.

^ Data

Task Type ▲ ✕

Tasks Status	User	Title
Task Type: Approve (17)	5	10
Task Type: Read/Complete (127)	56	9
Task Type: Review (6)	5	3

To change the sort order of data in a column, click the column heading to display the current sort order (up or down arrow), and then click it again to reverse the order.

^ Data


Task Type ▲ ✕

Find...

Tasks Status	User	▲ Title
Task Type: Approve (17)	5	10
Task Type: Read/Complete (127)	56	9
Task Type: Review (6)	5	3
Incomplete	Benton, Carol (Manager) - (20)	Account Collection Process - (358)
Incomplete	Breen, Darren (Personnel Manage...	Healthcare Benefits - (73)
Incomplete	Howard, Susan (Document, Contr...	Healthcare Benefits - (73)
Incomplete	Howard, Susan (Document, Contr...	Computer Security Incident Repor...
Incomplete	Thomas, Brad (Director of Operati...	Computer Security Incident Repor...

Working with Column Filters

You can use filters to refine report results to include only those records that match certain column data criteria.

1. In the **Data** pane header, click , and then click **Show Column Filters**.

^ Data

Task Type ▲ ✕

Find...

Tasks Status	User	Title
▼ Task Type: Read/Complete (32)	10	6
▼ Task Type: Review (6)	3	4
▲ Task Type: Submit (5)	2	5
Incomplete	Hansen, Tom (Accounting Manager)	Production Safety Guidelines
Incomplete	Hansen, Tom (Accounting Manager)	Laboratory Safety Guidelines
Incomplete	Johnson, Douglas (Chief Executive Officer)	↑ Travel Policy - South America
Incomplete	Johnson, Douglas (Chief Executive Officer)	↑ Travel Policy - Asia
Incomplete	Johnson, Douglas (Chief Executive Officer)	↑ Family and Medical Leave - South Region


Show Column Filters

Show/Hide Columns

Export to Excel

Export to CSV

Print Data

2. (Optional) By default, a filter will include only those records whose filtered columns contain the text you specify or are equal to the date you specify. Do one of the following:
- To change a text column's filter criterion, point to , and then click **Does not contain**, **Starts with**, **Ends with**, **Equals**, or **Does not equal**.

^ Data

Task Type ▲ ✕

Tasks Status	User
▼ Task Type: Read/Complete (32)	
▼ Task Type: Review (6)	
▲ Task Type: Submit (5)	
Incomplete	Accounting Mana
Incomplete	Accounting Mana
Incomplete	Chief Executi
Incomplete	Chief Executi
Incomplete	Chief Executi

Contains

Does not contain


Starts with

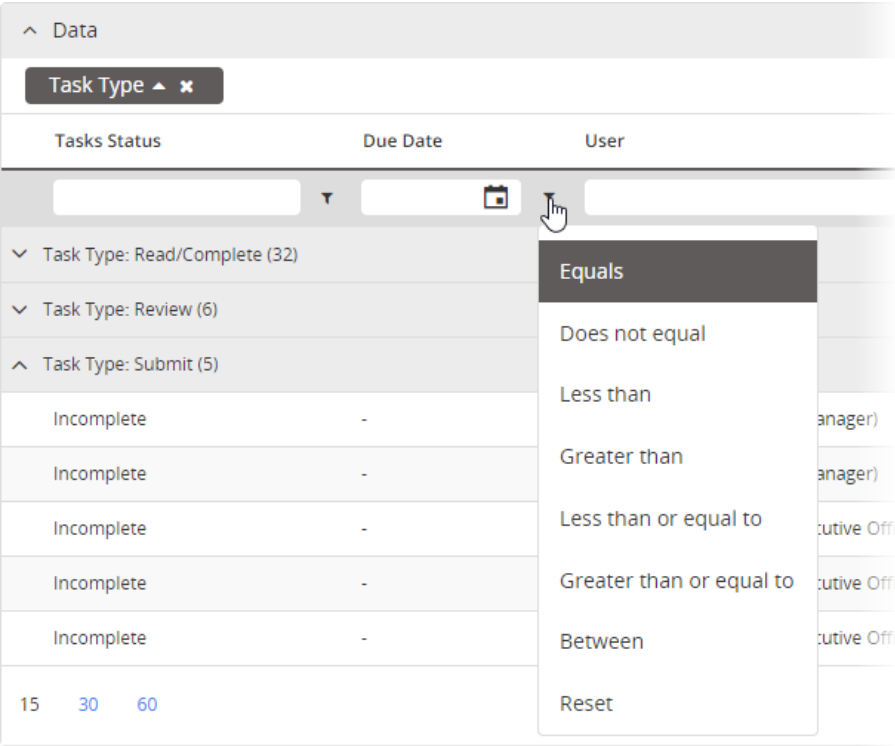
Ends with

Equals

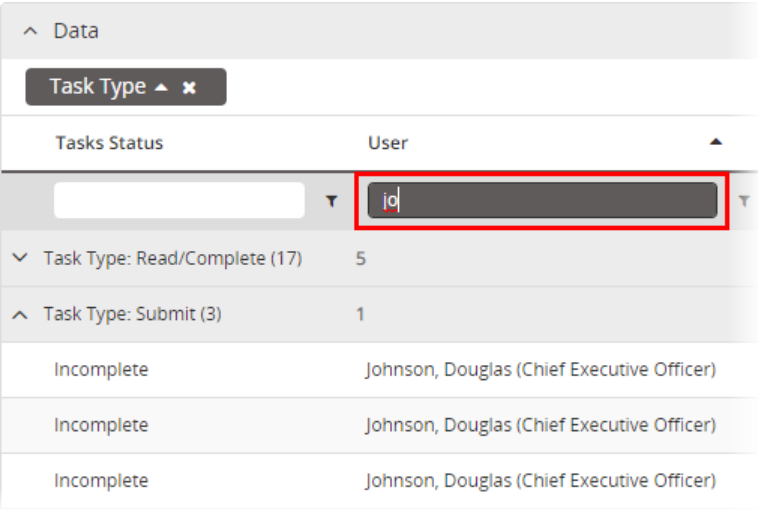
Does not equal


Reset

- To change date column's filter criterion, point to , and then click **Does not equal**, **Less than**, **Greater than**, **Less than or equal to**, **Greater than or equal to**, or **Between**.




2. Do one of the following, depending on the column type.
- For columns containing text, start typing text in the filter box. The filter is immediately applied as you type.



- For columns containing dates, click , and then select a date. (If the filter criterion is Between, select both a start and end date.)

To clear a filter, point to , and then click **Reset**.

Exporting Report Results

1. After customizing the report results, in the **Data** pane header, click , and then do one of the following:
 - Click Export to Excel to export report data to a .xlsx file.
 - Click Export to CSV (comma-separated value) to export report data to a .csv file (an Excel file saved in CSV format).



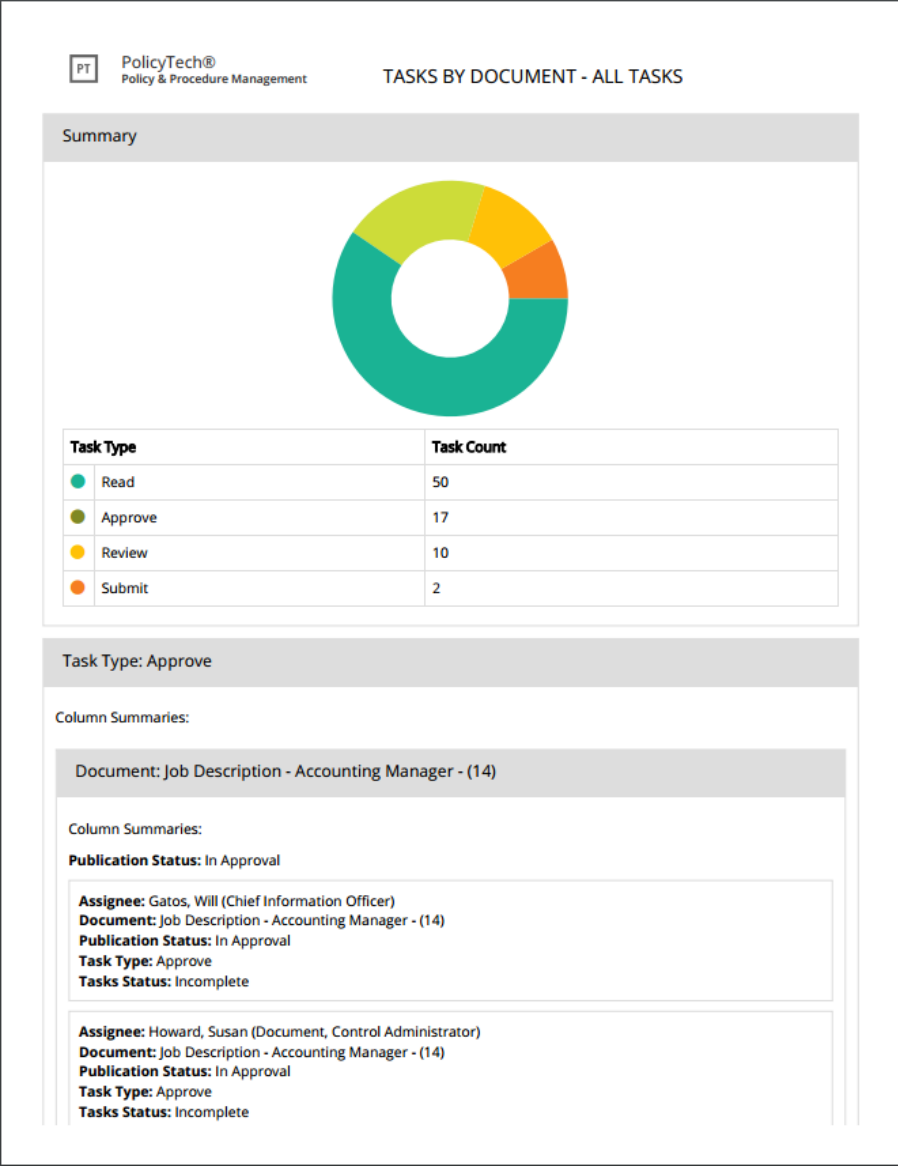
The screenshot shows the 'Data' pane header with a 'Task Type' filter set to 'Read/Complete (17)'. A search bar is present. A dropdown menu is open, showing options: 'Show Column Filters', 'Show/Hide Columns', 'Export to Excel' (highlighted with a red box), 'Export to CSV' (highlighted with a red box), and 'Print Data'. The table below the header has columns: 'Tasks Status', 'User', and 'Title'. It shows task status groupings and individual task entries.


Tasks Status	User	Title
Task Type: Read/Complete (17)	5	6
Task Type: Submit (3)	1	3
Incomplete	Johnson, Douglas (Chief Executive Officer)	↑ Travel Policy - South Region
Incomplete	Johnson, Douglas (Chief Executive Officer)	↑ Travel Policy - Asia
Incomplete	Johnson, Douglas (Chief Executive Officer)	↑ Family and Medical Leave - South Region


2. Follow the prompts to download and open the export file.


Printing or Saving Report Results

A printed or saved report contains both the Summary and Data panes (task reports) or just the Data pane (questionnaire reports). The Data section of the printed report will look similar to the Data pane grid in the report results with all groupings expanded.



1. After customizing the report results, in the **Data** pane header, click , and then click **Print Data**.

^ Data 

User 

Find...

Show Column Filters

Show/Hide Columns

Export to Excel

Export to CSV

Print Data

Task Type	Tasks Status	Title
✓ User: Cash, Jordon (Accounts Payable Clerk) (4)	25% Complete	4
✓ User: Chen, Jodi (Compliance Officer) (3)	66% Complete	3
✓ User: Johnson, Douglas (Chief Executive Officer) (6)	16% Complete	6
✓ User: Jones, Anne (Chief Finance Officer) (4)	50% Complete	4
✓ User: Woo, Josh (Accountant) (3)	33% Complete	3

2. For **Destination**, click **Change**, and then select a printer or click **Save as PDF**.

The screenshot shows the PolicyTech® print interface. The left sidebar contains the following settings:

- Print**: Total: 14 pages, with **Save** and **Cancel** buttons.
- Destination**: **Save as PDF** (selected), with a **Change...** button.
- Pages**: **All** (selected), with a text input field showing "e.g. 1-5, 8, 11-13".
- Layout**: **Portrait** (selected).
- Paper size**: **Letter** (selected).
- Margins**: **Default** (selected).
- Options**: ☐ Headers and footers, ☐ Background graphics.

The main report area is titled "TASKS BY DOCUMENT - ALL TASKS". It includes a **Summary** section with a donut chart and a table of task counts:

Task Type	Task Count
Read	50
Approve	17
Review	10
Submit	2

Below the table, the report is filtered by **Task Type: Approve**. It shows **Column Summaries** for the document **Document: Job Description - Accounting Manager - (14)**. The summary includes:

- Publication Status:** In Approval
- Assignee:** Gatos, Will (Chief Information Officer)
- Document:** Job Description - Accounting Manager - (14)
- Publication Status:** In Approval
- Task Type:** Approve
- Tasks Status:** Incomplete
- Assignee:** Howard, Susan (Document, Control Administrator)
- Document:** Job Description - Accounting Manager - (14)
- Publication Status:** In Approval
- Task Type:** Approve
- Tasks Status:** Incomplete

3. Adjust other print settings as necessary, and then do one of the following:
- If you selected a printer as the print destination, click **Print**.
 - If you select **Save as PDF** as the print destination, click **Save**, and then follow the prompts.

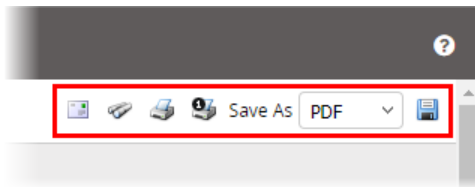
Working with a Finished Legacy Report

Important: This section is for working with the finished results of all reports except the following next-generation reports:


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

For help with these reports, see [Working with Next-Generation Report Results](#).

When you click **View Report**, the report header contains several options for working with the finished report.




Lets you send the report to another PolicyTech user.

1. Click , and then after reading the security alert, click **Continue**.
2. To select recipients one by one, search for a user by first or last name, and then click the name in the search results.
3. Click **Send**, and then click **OK**.



Lets you search for specific text anywhere in the report.

Note: Unlike the browser's Find feature that searches only the currently displayed report page,  searches through the entire report contents.



Opens the **Print** feature where you can adjust print settings and send all or selected pages of the report to a printer.




Opens the **Print** feature with only the current page selected.



Lets you save the report to disk.

1. In the **Save As** drop-down menu, select a file format (PDF is the default).

2. Click , and then follow the prompts.

Using Saved Report Settings Features

[Saving a Report's Settings](#)


[Using a Saved Report Setup to Generate a Report](#)

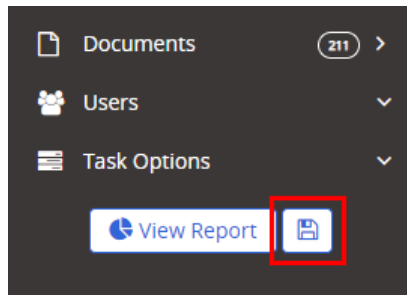
[Emailing a Report from a Saved Setup](#)

[Disabling the Automatic Emailing of a Report](#)

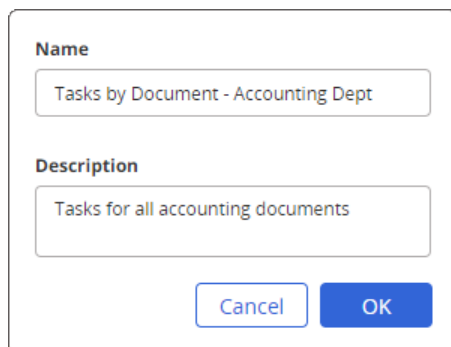
Saving a Report's Settings

To save report settings,

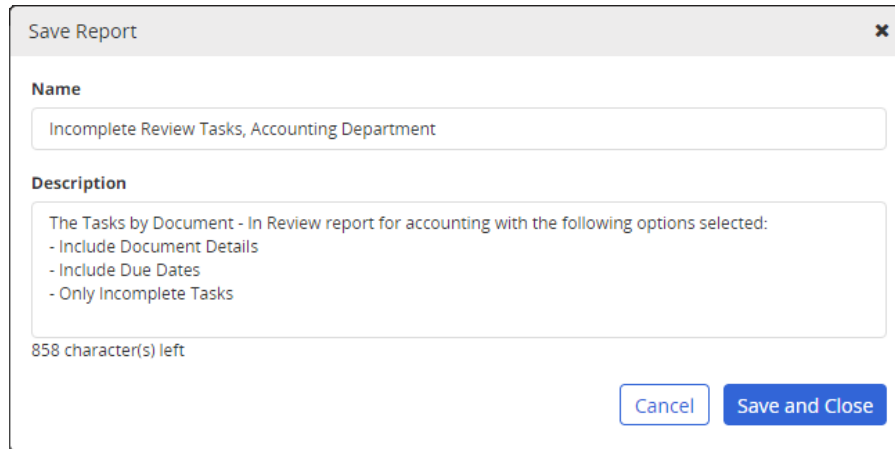
1. If the report setup screen is not already displayed, Click **Reports**, find and click the report, and then set up the report as you normally would.
2. Click .



3. Type a name and description for this report setup.
4. Do one of the following, depending on what you see:
 - Click **OK**.

A screenshot of a dialog box for saving report settings. It has two text input fields: 'Name' with the text 'Tasks by Document - Accounting Dept' and 'Description' with the text 'Tasks for all accounting documents'. At the bottom, there are two buttons: 'Cancel' and 'OK'.

- Click **Save and Close**, and then click **OK**.



Save Report

Name

Incomplete Review Tasks, Accounting Department

Description

The Tasks by Document - In Review report for accounting with the following options selected:



- Include Document Details
- Include Due Dates
- Only Incomplete Tasks

858 character(s) left

[Cancel](#) [Save and Close](#)

5. Close the report.

Important: Saving a report's settings does not save the report contents, even if you click **View Report** before saving. To save an instance of a generated report, do one of the following:

- If you're in a next-generation report (Tasks by Document - Current, Tasks by Document - All Tasks, Tasks by User - Current, or Tasks by User - All Tasks), in the **Data** pane, click , and then click **Print Data**. For **Destination**, click **Change**, and then click **Save as PDF**. Click **Save**, and then follow the prompts.
- For any other report, in the report viewing pane, in the **Save As** list, click a format. Then, click  and follow the prompts.

Using a Saved Report Setup to Generate a Report

1. Click **Reports**, and then click **My Saved Reports**.
2. Click the saved report's name.



3. (Optional) Make changes to the saved report's settings.
4. Click **View Report**.

Emailing a Report from a Saved Setup

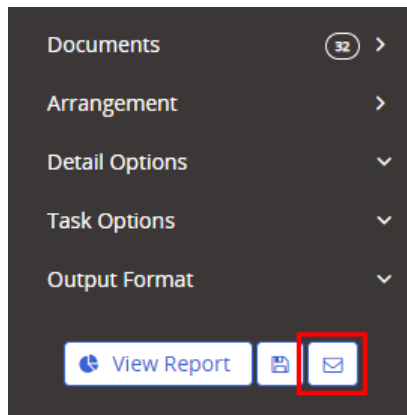
Important: This feature is available only if all of the following are true:

- You have been assigned the Report Manager or Administrator permission.
- You have been assigned a valid email address in your user profile.
- PolicyTech has been correctly set up to send emails.
- You are working with one of the following, previously saved Tasks by Document or Tasks by User reports:
 - Documents Due for Periodic Review
 - Documents with Links to Update
 - Document Owner - Periodic Review Tasks
 - Document Owner - Links to Update Tasks

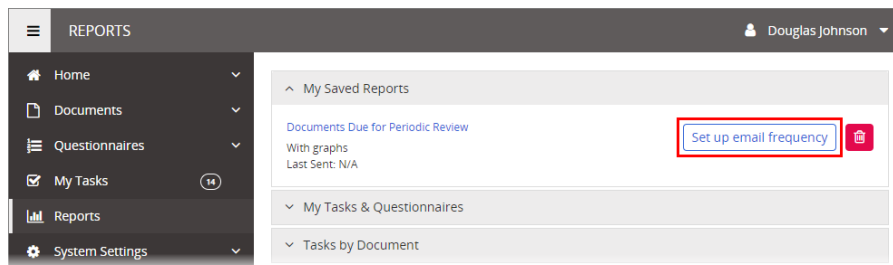
After saving a Tasks by Document or Tasks by User report (see [Saving a Report's Settings](#)), you can set up a schedule for automatically generating and emailing yourself the summary portion of the report based on the saved settings.

1. Do one of the following:

- With the report displayed, click  near the **View Report** button.



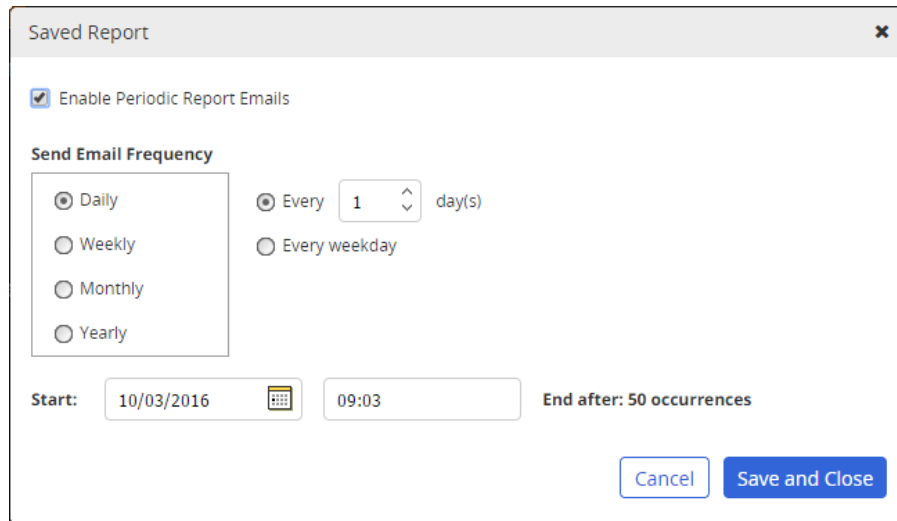
- Click **Reports**, and then click **Saved Reports**. For the saved setup you want to schedule, click **Set up email frequency**.



2. Select **Enable Periodic Report Emails**.



The window expands to show scheduling options.



3. In the **Send Email Frequency** area, clicking one of the four options in the list on the left changes the options displayed to the right of the list. In the list on the left, do one of the following:
 - Click **Daily**, and then do one of the following:
 - Click **Every**, and then type a number of days between recurrences.
 - Click **Every weekday** if you want the report generated and emailed on each business day (Monday through Friday).
 - Click **Weekly**. In the **Recur every** box, type a number of weeks, and then select the days you want emails sent during a set week.

Saved Report

☒ Enable Periodic Report Emails

Send Email Frequency

☐ Daily
☒ Weekly
☐ Monthly
☐ Yearly

Recur every 1 week(s) on:

☒ Sun ☒ Mon ☒ Tue ☒ Wed
☒ Thu ☒ Fri ☒ Sat

Start: 10/03/2016 09:03 End after: 50 occurrences

Cancel

Save and Close

- Click **Monthly**, and then do one of the following:
 - Click **Day**, type a number for the day of the month, and then type the number of months between recurrences.
 - Click **The**, select an ordinal number (**First**, **Second**, **Third**, **Fourth**, or **Last**), select a day, and then, in last box, type the number of months between recurrences.

Saved Report

☒ Enable Periodic Report Emails

Send Email Frequency

☐ Daily
☐ Weekly
☒ Monthly
☐ Yearly

☒ Day 1 of every 1 month(s)
☐ The First Day of every 1 month(s)


Start: 10/03/2016 09:03 End after: 50 occurrences

Cancel

Save and Close

- Click **Yearly**, and then do one of the following:
 - Click **Every**, and then select a month and day.
 - Click **The**, select an ordinal number (**First**, **Second**, **Third**, **Fourth**, or **Last**), select a day, and then select a month.

The screenshot shows a 'Saved Report' dialog box with a close button (X) in the top right corner. Inside the dialog, there is a checkbox labeled 'Enable Periodic Report Emails' which is checked. Below this is a section titled 'Send Email Frequency'. It contains a list of radio buttons for frequency: Daily, Weekly, Monthly, and Yearly. The 'Yearly' option is selected. To the right of the radio buttons are two sets of controls. The first set is for 'Every' with a dropdown menu set to 'January' and a numeric input set to '1'. The second set is for 'The' with a dropdown menu set to 'First', followed by a dropdown menu set to 'Day', and then 'of' followed by a dropdown menu set to 'January'. At the bottom left, there is a 'Start:' label followed by a date input field containing '10/03/2016' and a calendar icon. To the right of the date is a time input field containing '09:03'. Further right is the text 'End after: 50 occurrences'. At the bottom right are two buttons: 'Cancel' and 'Save and Close'.

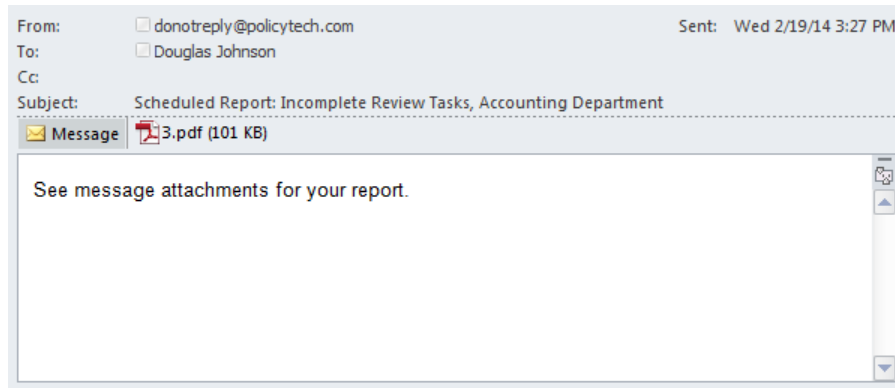
5. Next to the **Start** box, click , and then navigate to and click the date when you want automatic emailing of reports to start.
6. In the second box after **Start**, type the time of day when you want the emails sent.

Notes about the number of email occurrences:

- Report emails will be sent a maximum of 50 times on the currently set schedule. After 50 occurrences, emailing is disabled. To start emailing the same reports again, open the saved report setup, select **Enable Periodic Report Emails** and select a new start date.
- Rather than keep a running total of occurrences, PolicyTech calculates an end date based on the schedule settings at the time you save them. It then disables emailing of this report once that date passes. For example, if you select **Daily** as the recurrence method and want emails to go out every 2 days with a start date of 6/1/2014, the first email is sent out on 6/1, with each subsequent email sent out every other day thereafter (6/3, 6/5, 6/7, and so on). That means the 50th and last occurrence of the periodic emails falls on 9/7/2014—the calculated end date. As soon as a report email is sent on that date, PolicyTech clears the **Enable Periodic Report Emails** selection.
- To disable periodic report emails at any time before 50 occurrences, open the saved report setup, and then click to clear **Enable Periodic Report Emails**.

7. Click **Save and Close**.

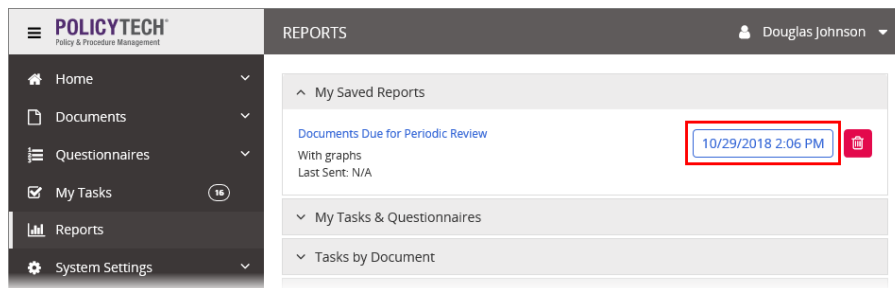
An email similar to the one shown below will then be sent to at each "send" occurrence in the set schedule. Open the attachment to view the report



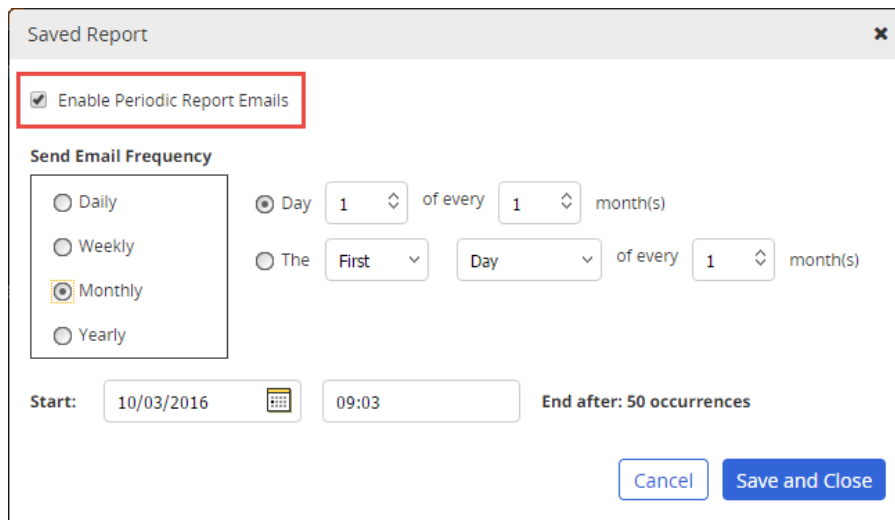
Disabling the Automatic Emailing of a Report

After enabling a report to be emailed to yourself automatically on a set schedule, you can easily disable this functionality at any time.

1. Click **Reports**, and then click **Saved Reports**.
2. For the report you want to disable, click the button with the displayed date and time for the next scheduled email.



3. Click to clear the **Enable Periodic Report Emails** check box.



4. Click **Save and Close**.

Creating Custom Reports with Excel

You can create any number of custom reports using document and user data from PolicyTech combined with the rich data display functionality of Microsoft Excel.

Important: It is not within the scope of this topic to teach how to use Excel features. The topic assumes that your knowledge of and skills in using Excel are at an intermediate or advanced level.

The Excel Report Template

When you create an Excel report using PolicyTech data, you are, in effect, creating a template. If you are an administrator or have been assigned the template role, you can create the report as a PolicyTech template. Otherwise, you can create the template as a stand-alone Excel file.

We recommend creating the template inside PolicyTech for the following reasons:

Control

- Reports (documents) created using the PolicyTech template are stored in the PolicyTech database with version control.
- PolicyTech saves copies, or snapshots, of each report whenever both the content and status of the report document change.
- You can set up email reminders for reading the report and reviewing it to ensure it is up to date.

Security and Access

- Only users with assigned permissions can view or edit the reports. Document security options range from allowing the public to view the document down to only allowing administrators to view it.
- The report can be viewed or edited from wherever PolicyTech users have Internet access. If a user needs to access or edit the report offline, the report can be downloaded and then imported back into PolicyTech so that any changes made offline are preserved.

Functionality

- The full Excel feature set is available.
- You can edit the Excel template in PolicyTech (in a browser window) or in undocked mode, where you edit the template within the Excel application for Windows®.

Notes:


- When working in Excel in undocked mode, each time the worksheet is saved a copy of it is automatically uploaded to PolicyTech.
- Editing an Excel document in a PolicyTech browser window may require a double-click to activate a cell or use shortcut keys, such as Ctrl+C and Ctrl+V.
- Some Excel functionality, such as protected mode, may disable certain PolicyTech editing tools, such as inserting document properties.

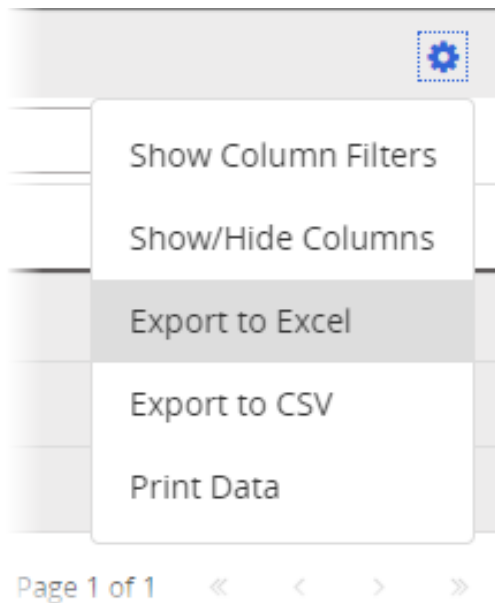
Creating an Excel Report Template

1. Do one of the following:

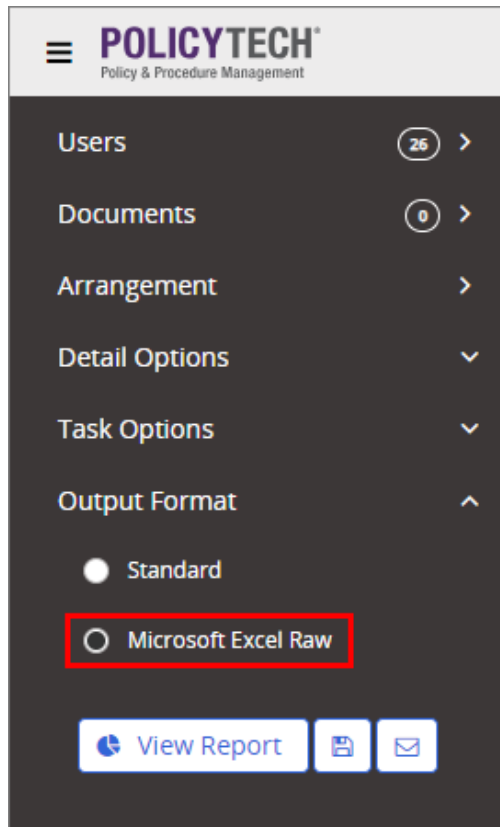
- Add an Excel template in PolicyTech and assign its properties. Be sure to select **Excel Spreadsheet** as the document type. (See "Creating a Template" in the [Administrator's Guide](#) for detailed instructions.)

Note: If you prefer to work with Excel undocked from the PolicyTech browser window, see "Working with Word or Excel Undocked" in the [User's Guide](#).

- Create a new workbook in the Excel application.
2. Do one of the following, depending on the type of PolicyTech report you're generating:
- Generate one or more next-generation reports. Then, in the **Data** section header, click , and then click **Export to Excel**.



- Generate one or more legacy management reports with Microsoft Excel Raw selected as the output format.



3. In the template's **Edit Document** window or in the stand-alone workbook, copy and paste the exported report data into a template worksheet. (You may want to copy and paste only the report headings into the template.)

Important: You may want to designate one worksheet for storing only the PolicyTech report data and then format the report on a different worksheet, with cell references to the report data. This will preserve the ability to quickly copy and paste PolicyTech report data.

4. Add report content, such as headings, formulas, graphics, charts, and tables, and then save and close the template or stand-alone workbook.
5. Save and close the template.

Generating an Excel Report

Now that the template is in place, you can create the actual report.

1. If you created the report template in PolicyTech, create an Excel document as you normally would (see "Creating a Document" in the [User's Guide](#))

and assign the report template to the document. If not, skip this step.

2. Run the report or reports containing the data the report template needs, and then copy and paste the data into the report.
3. Save the report document (workbook).

Note about PolicyTech documents: Unless you want the report document reviewed and approved, you should probably keep it in draft status.

4. The next time you want to run the report, do one of the following:
 - If you don't care about losing the data from the last time you ran the report, simply copy and paste the new data over the old.
 - To preserve the report with its previous data, do one of the following:
 - If you created the report document in PolicyTech and are an administrator, set the document as approved (see "Setting a Document as Approved" in the [Administrator's Guide](#)). If you're not an administrator, send the document through the review and approval process until it is approved (see "Submitting a Document or Questionnaire to Writers, Reviewers, or Approvers" in the [User's Guide](#)). In the approved document, create a new version (see "Doing a Periodic Review and Creating a New Version" in the [User's Guide](#)), and then copy and paste the new data over the old.
 - If you created the report in stand-alone Excel, copy and paste the new data over the old, and then use **Save As** to save the workbook with a different file name.

Sample Reports

In the simple report below, the table was created from the data of a **Document Assignments by Title** report, and the data was copied directly into the table. Notice that PolicyTech sorts the rows alphabetically ascending—first by title, and then by assignment type. You can change which column is the first sorting key by clicking the down arrow in the column heading and then selecting a sort order. However, since the data is copied directly into this report to create it, you wouldn't want to change the column arrangement so you could copy and paste new data directly over the old.

Note: If you create a table from PolicyTech report data, you may need to adjust the table size each time you copy and paste new data into the report.

	A	B	C	D	E	F	G
1	Title (Version)	Version	Ref. #	Status	User	Assignment Type	
2	Anti-Bribery Policy (v.1)	1	233	Approved	Potts, Tony (Document Control Administrator)	Approver	
3	Anti-Bribery Policy (v.1)	1	233	Approved	Potts, Tony (Document Control Administrator)	Document Owner	
4	Bank Account Reconciliation (v.3)	3	4	Approved	Hansen, Tom (Accounting Manager)	Reviewer	
5	Bank Account Reconciliation (v.3)	3	4	Approved	Johnson, Douglas (Chief Executive Officer)	Approver	
6	Bank Account Reconciliation (v.3)	3	4	Approved	Hansen, Tom (Accounting Manager)	Document Owner	
7	Capitalization (v.2)	2	5	Approved	Hansen, Tom (Accounting Manager)	Reviewer	
8	Capitalization (v.2)	2	5	Approved	Johnson, Douglas (Chief Executive Officer)	Approver	
9	Capitalization (v.2)	2	5	Approved	Hansen, Tom (Accounting Manager)	Document Owner	
10	Cash Drawers (v.2)	2	6	Approved	Hansen, Tom (Accounting Manager)	Reviewer	
11	Cash Drawers (v.2)	2	6	Approved	Johnson, Douglas (Chief Executive Officer)	Approver	
12	Cash Drawers (v.2)	2	6	Approved	Hansen, Tom (Accounting Manager)	Document Owner	
13	Cash Receipts (v.1)	1	7	Approved	Hansen, Tom (Accounting Manager)	Reviewer	
14	Cash Receipts (v.1)	1	7	Approved	Johnson, Douglas (Chief Executive Officer)	Approver	
15	Cash Receipts (v.1)	1	7	Approved	Hansen, Tom (Accounting Manager)	Document Owner	
16	Chart of Accounts (v.1)	1	8	Approved	Hansen, Tom (Accounting Manager)	Reviewer	
17	Chart of Accounts (v.1)	1	8	Approved	Johnson, Douglas (Chief Executive Officer)	Approver	
18	Chart of Accounts (v.1)	1	8	Approved	Hansen, Tom (Accounting Manager)	Document Owner	
19	Check Requests (v.1)	1	9	Approved	Hansen, Tom (Accounting Manager)	Reviewer	
20	Check Requests (v.1)	1	9	Approved	Johnson, Douglas (Chief Executive Officer)	Approver	

In the report below, the data was copied into a worksheet separate from the report worksheet, and cell references were used to populate the table. Notice that the column arrangement has been changed to show the key sorting column (**Title**) first. Also, the **Version** column has not been included, because the version number is already included with the document title. Changing the column arrangement does not disturb data entry, because the report data is in another place.

	A	B	C	D	E	F
1	Title (Version)	Version	Status	User	Assignment Type	
2	Anti-Bribery Policy (v.1)	1	Approved	Potts, Tony (Document Co Approver		
3	Anti-Bribery Policy (v.1)	1	Approved	Potts, Tony (Document Co Document Owner		
4	Bank Account Reconciliation (v.3)	3	Approved	Hansen, Tom (Accounting Reviewer		
5	Bank Account Reconciliation (v.3)	3	Approved	Johnson, Douglas (Chief E Approver		
6	Bank Account Reconciliation (v.3)	3	Approved	Hansen, Tom (Accounting Document Owner		
7	Capitalization (v.2)					
8	Capitalization (v.2)					
9	Capitalization (v.2)					
10	Cash Drawers (v.2)					
11	Cash Drawers (v.2)					
12	Cash Drawers (v.2)					
13	Cash Receipts (v.1)					
14	Cash Receipts (v.1)					
15	Cash Receipts (v.1)					
16	Chart of Accounts (v.1)					
17	Chart of Accounts (v.1)					
18	Chart of Accounts (v.1)					
19	Check Requests (v.1)					
20	Check Requests (v.1)					

	A	B	C	D	E	F
1	Title (Version)	Ref. #	Status	User	Assignment Type	
2	Anti-Bribery Policy (v.1)	233	Approved	Potts, Tony (Document Control A Approver		
3	Anti-Bribery Policy (v.1)	233	Approved	Potts, Tony (Document Control A Document Owner		
4	Bank Account Reconciliation (v.3)	4	Approved	Hansen, Tom (Accounting Manag Document Owner		
5	Bank Account Reconciliation (v.3)	4	Approved	Hansen, Tom (Accounting Manag Reviewer		
6	Bank Account Reconciliation (v.3)	4	Approved	Johnson, Douglas (Chief Executiv Approver		
7	Capitalization (v.2)	5	Approved	Hansen, Tom (Accounting Manag Document Owner		
8	Capitalization (v.2)	5	Approved	Hansen, Tom (Accounting Manag Reviewer		
9	Capitalization (v.2)	5	Approved	Johnson, Douglas (Chief Executiv Approver		
10	Cash Drawers (v.2)	6	Approved	Hansen, Tom (Accounting Manag Document Owner		
11	Cash Drawers (v.2)	6	Approved	Hansen, Tom (Accounting Manag Reviewer		
12	Cash Drawers (v.2)	6	Approved	Johnson, Douglas (Chief Executiv Approver		
13	Cash Receipts (v.1)	7	Approved	Hansen, Tom (Accounting Manag Document Owner		
14	Cash Receipts (v.1)	7	Approved	Hansen, Tom (Accounting Manag Reviewer		
15	Cash Receipts (v.1)	7	Approved	Johnson, Douglas (Chief Executiv Approver		
16	Chart of Accounts (v.1)	8	Approved	Hansen, Tom (Accounting Manag Document Owner		
17	Chart of Accounts (v.1)	8	Approved	Hansen, Tom (Accounting Manag Reviewer		
18	Chart of Accounts (v.1)	8	Approved	Johnson, Douglas (Chief Executiv Approver		
19	Check Requests (v.1)	9	Approved	Hansen, Tom (Accounting Manag Document Owner		
20	Check Requests (v.1)	9	Approved	Hansen, Tom (Accounting Manag Reviewer		

The report below includes a pivot table created from the same data as the previous two reports.

	A	B	C
1			
2		Row Labels	
3		⊕ Approver	
4		⊖ Document Owner	
5		⊖ Benton, Carol (Environmental Control Manager)	
6		Cleaning Checklist (v.1)	
7		Job Description - Environmental Control Manager (v.1)	
8		Job Description - Janitor (v.1)	
9		Performance Evaluation - Environmental Control Manager (v.1)	
10		Performance Evaluation - Janitor (v.1)	
11		Performance Evaluation - MSDS Technician (v.1)	
12		⊕ Breen, Darren (Personnel Manager)	
13		⊕ Farnsworth, John (Information Systems Manager)	
14		⊕ Gleeson, Edward (Manufacturing Manager)	
15		⊕ Hansen, Tom (Accounting Manager)	
16		⊕ Johnson, Douglas (Chief Executive Officer)	
17		⊕ Lavin, Alice (Manager)	
18		⊕ Potts, Tony (Document Control Administrator)	
19		⊕ Rydalch, Cindy (Receiving)	
20		⊕ Stoker, Brent (Director of Engineering)	
21		⊕ Thomas, Brad (Director of Operations)	
22		⊕ Wright, Fred (Software Development Manager)	
23		⊕ Reviewer	
24		⊕ Writer	
25		Grand Total	
26			
27			
28			

