

# NAVEXGLOBAL<sup>™</sup> The Ethics and Compliance Experts

# **Third-Party Contacts Supplement**

PolicyTech<sup>®</sup> 9.2



PolicyTech<sup>®</sup> 9.2 Third-Party Contacts Supplement

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# **Table of Contents**

Table of Contents	. i
Third-Party Accounts Overview for Administrators	1
Adding a Third-Party Account	. 1
Adding a Third-Party Contact	. 3
Working with Account Manager	. 5
Edit or Delete an Account	5
Edit or Delete a Contact	5
Restore an Account or Contact	6
Email a Contact	. 7
Show or Hide Columns	. 7
Change the Number of Contacts Displayed Per Page	. 7
Use Filters to Narrow an Account or Contact List	. 8
Export an Account or Contact List	. 8
Adding a Reader Group for Third-Party Contacts	. 9
Enabling Third-Party Contact Assignments in a Template	11
About the Welcome Email	12
Resending a Welcome Email	12
Using Third-Party Contact Features	14
Assigning Tasks to a Third-Party Contact	14
Completing a Task as a Third-Party Contact	16
Logging In for the First Time	17
Responding to a Task Assignment after Initial Login	20
Logging in to PolicyTech as a Third-Party Contact	21

# Third-Party Accounts Overview for Administrators

**Important:** The **Third-Party Accounts** module must be purchased separately from PolicyTech<sup>™</sup> licenses. If you have questions about or want to purchase the **Third-Party Accounts** module, call Client Support at 888-359-8123 (toll-free in the U.S. and Canada) or 208-359-8123.

The **Third-Party Accounts** module lets you and other users do the following in PolicyTech:

- Add a vendor or client as an account
- Add any of the vendor's or client's employees—called contacts in PolicyTech—to an account
- Assign third-party contacts to write, review, or read a document
- Have third-party contacts receive notification and reminder emails to complete their writing, reviewing, or reading tasks

Setting up third-party accounts consists of the following tasks:

Adding a Third-Party Account

Adding a Third-Party Contact

Working with Account Manager

Enabling Third-Party Contact Assignments in a Template

After setting up third-party accounts, refer users to the following topics:

Assigning Tasks to a Third-Party Contact

Completing a Task as a Third-Party Contact

Logging in to PolicyTech as a Third-Party Contact

# **Adding a Third-Party Account**

- 1. Click **PREFERENCES**.
- 2. Click Third-Party Setup, and then click Account Manager.
- 3. Click New Account.

2 - Third-Party Accounts Overview for Administrators

policytech	DOCUMENTS MY TASKS (12) REPORTS PREFERENCES Welcome Do	ouglas Johnson   LO	OG OUT
policyteen			
		ABOUT	
Preferences	New Account Sync Third-Party Contacts		
Personal Settings			
Company Setup	Sites Corporate Headquarters		
Third-Party Setup	Page 1 of 0 (0 items)	Display/Export Optic	ons 👻
Account Manager Recycle Bin	Account Numbe Account Name   A Secondary Name   City  State/Province	Country	
Vser Setup Document Setup System / IT Settings	None Found		^
	6	>	~
NAVEX global"	Page 1 of 0 (0 items) 🔍 🔇 🗩 📨		
	Privacy Statement   Terms of Use		

4. Type a name for the account.

Accounts				/ 8
Set up an account representatives, and rev	viewers for externa	al accounts.		
Account Name		<ul> <li>Acc</li> </ul>	ount Info	
Sites		~		
Contacts O Add Contact			🗊 Delete S	elected
Page 1 of 0 (0 items) 🔍 🗙 📎		D	isplay/Export Opt	ions 👻
Unique Contact ID First Name	Last Name	Email	Department	J
	None Fou	nd		^
				~

5. (Optional) Click **Account Info**, add information about this account, and then click **OK**.

Account Info	0
Account Number	
Secondary Name	
Acronym	
Address	
City	
State/Province	
Country	
Postal Code	
Phone Number	
Website	
	OK Cancel

6. In the **Sites** list, select the check boxes for the sites where users from this account can be assigned to documents.

Accounts	
Set up an account representatives, and reviewers for external accounts	
Account Name Acme Suppliers 0	Account Info
Sites Corporate Headquarters	
Contacts • Ad Corporate Headquarters	<b>t</b> (
Page 1 of 0 (0 ite Sales & Support Office	Display/Exp
Unique C	Depar
✓	

- 7. Click Save.
- 8. (Optional) Repeat steps 1 through 7 to add other accounts.

# Adding a Third-Party Contact

- 1. Click **PREFERENCES**.
- 2. Click Third-Party Setup, and then click Account Manager.
- 3. Click an account to open the Accounts form.

**Note:** If no accounts exist yet, you'll need to add one before you can add a contact. See Adding a Third-Party Account.

4. Click Add Contact.

Accounts		
Set up an accour	nt and add contacts to it.	
Account Name	NAVEX Global	
Sites	Corporate Headquarters	
Contacts O Add Contact		
	ems) « < > »	
Unique	e Contact ID △ First Name	

5. In the Add Contact window, provide at least the following information: Unique Contact ID, First Name, Last Name, Email Address (for task notifications), Department.

Add Contact	0
Unique Contact ID*	
First Name*	
Middle Name	
Last Name*	
Email Address*	
Department*	
Job Title	
Language	(Default)
Account Rep	
* - Required Fields	
(	Save Contact   Cancel

6. (Optional) If there are multiple contacts for the current account and you want to designate this contact as the account representative, select the **Account Rep** check box.

#### Notes:

- When assigning third-party contacts to review or read a document, you have the option of assigning all account representatives.
- In all third-party contact lists, account representatives are marked with an asterisk (\*).
- 7. Click Save Contact.
- 8. (Optional) Repeat steps 4 through 6 to add other contacts to this account.

9. In the Accounts window, click Save.

## Working with Account Manager

In the third-party Account Manager, you can do any of the following:

#### **Edit or Delete an Account**

Click the account name, and then do one of the following:

- Make changes, and then click **Save**.
- Click **Delete Account**, and then click **Yes**.

**Note:** The account is moved to the **Recycle Bin** (see "Restoring an Account or Contact" below).

Accounts						8
Set up an accour	nt represer	ntatives, and re	viewers for extern	al accounts.		
Account Name	Acme Su	ppliers		Accou	nt Info	
Sites	Corporate	e Headquarters	i	$\sim$		
Contacts 😋 Ad	ld Contact				🕆 Delete S	elected
Page 1 of 1 (1 ite	ems) 🔍 🔇	1>>		Disp	olay/Export Opti	ons 🔻
Unique C	ontact ID	First Name	Last Name	Email	Department	J
acme.jbar	nett	Jason	Barnett	jbarnett@acmes	J Sales	
						~
<						>
Page 1 of 1 (1 ite	ems) < <	1>>>				
		Save	Delete Account Ca	ancel		

#### **Edit or Delete a Contact**

Click the account containing the account record, click the account name, and then do one of the following:

 Make changes, click Save Account, and then, in the Accounts window, click Save.

Edit Contact	•
Unique Contact ID*	acme.jbarnett
First Name*	Jason
Middle Name	
Last Name*	Barnett
Email Address*	jbarnett@acmesuppliers.com
Department*	Sales
Job Title	
* - Required Fields	
	Save Contact Cancel

 Select check boxes of one or more contacts, click **Delete Selected**, and then click **Save**.

**Note:** The contact is moved to the **Recycle Bin** (see "Restoring an Account or Contact" below).

#### **Restore an Account or Contact**

When you delete an account or a contact, it is moved to the **Recycle Bin**, where it is stored until you restore it or permanently delete it.

To restore an account or contact,

1. In the left navigation menu under Third-Party Setup, click Recycle Bin.

<b>policy</b> tech	DOCUMENTS MY TASKS (12) REPORTS PREFERENCES
policyteen	
	Site: Corporate Headquarters 🕶
Preferences	
Personal Settings	Recycle Bin
Company Setup	Location Third-Party Accounts
Third-Party Setup	
Account Manager	Page 1 of 1 (1 items) 🔍 < 1 🔉 📎
Recycle Bin	Account Numbe Name
User Setup	
Document Setup	
System / IT Settings	Acme Suppliers Acme Suppliers

2. In the Location list, click Third-Party Accounts or Third-Party Contacts.

policytech	DOCUMENTS MY TASKS (12) REPORTS PREFERENCE
_	Site: Corporate Headquarters -
Preferences	
Personal Settings	Recycle Bin
Company Setup	Location Third-Party Accounts
Third-Party Setup	Documents
Account Manager	Page 1 of Sites
Recycle Bin	Departments
User Setup	User Groups
Document Setup	Job Titles Categories/Subcategories
System / IT Settings	Third-Party Accounts
	Third-Party Contacts

3. Select the check boxes of one or more accounts or contacts, click **Restore**, and then click **OK**.

## **Email a Contact**

If the **Email** column is shown in a contact list, click a contact's email address to open your default email application with that address on the **To** line.

#### **Show or Hide Columns**

Click **Display/Export Options**, click **Show/Hide Column**, and then select or click to clear column check boxes.

	Display/Export Options -		
	Show/Hide Columns -	- 1	
	Account Numbe		
_	Secondary Nam	$^{1}$	
	Acronym	- 1	
	Address	~ I	
	ਾ City		
	Display Options	-1	
	Filter Options	-1	
	Export List	-1	
	Reset Column Layou	t	
	Close		

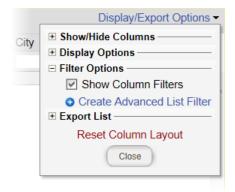
#### **Change the Number of Contacts Displayed Per Page**

In the Account Manager or Accounts window, click Display/Export Options, and then click Display Options. In the Contacts Per Page list, click a number, and then click Close.

	Display/Export Options -				
State/F	Show/Hide Columns				
otaton	Display Options ————————————————————————————————————				
	20 V Accounts Per Page				
	+ F <sup>20</sup> ons				
	250 Column Layout				
	500 Close				
	Close				

#### **Use Filters to Narrow an Account or Contact List**

Click **Display/Export Options**, click **Filter Options**, and then see "Working with Filters" in the <u>Administrator's Guide</u> for further instructions.



#### **Export an Account or Contact List**

Click **Display/Export Options**, click **Export List**, click an export format, and then follow the prompts to open or save the exported file.

r	Display/Export Options -
mail	🗄 Show/Hide Columns ———
ba <b>rne</b> f	Display Options
	Filter Options ———
	Export List
	Export List as XLS
	Export List as XLSX
	Export List as CSV
	Reset Column Layout
	Close
L	>

# Adding a Reader Group for Third-Party Contacts

After adding accounts and contacts, you can create contact groups that document owners can use to quickly assign multiple contacts at once to read a document. You can add a reader group that includes third-party contacts from a single site or a group that includes third-party contacts from multiple sites.

1. Click **PREFERENCES**, click **Third-Party Setup**, and then click **Group Manager**.

<b>policy</b> tech	DOCUMENTS MY TASKS (12) REPORTS PREFERENCES
	Site: Corporate Headquarters 🕶
Preferences	New 👻 🗾 Edit 🛍 Delete 🛛 🕄 Help
Personal Settings	
Company Setup	Corporate Headquarters
Third-Party Setup	Multi-Site (Global) Groups
Account Manager	Orporate Headquarters
Group Manager	
Recycle Bin	
User Setup	
Document Setup	
System / IT Settings	

2. In the site list below the **New** button, click a site containing at some the third-party contacts you want to assign to the group.

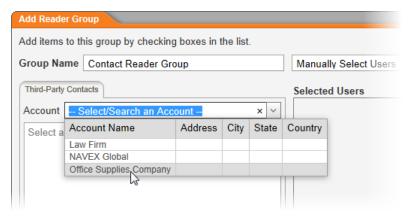
Corporate Headquarters	~
Corporate Headquarters	
Manufacturing 🛛 🗟	
Sales & Support Office	

3. Click New, and then click New Group or New Multi-Site (Global) Group.



- 4. Type a group name.
- 5. In the list after the group name, do one of the following:

- To include specific contacts from specific sites and accounts, click Manually Select Users, and then do the following.
  - a. In the **Account** list, click an account that includes at least one of the contacts you want to include.



b. Select the check box of each contact you want included in the group.

**Note:** Contacts designated as account representatives are marked with an asterisk (\*).

Add Reader Group					
Add items to this group by checking boxes in the list.					
Group Name Contact Reader Group	Manually Select Users 🛛 🕤				
Third-Party Contacts	Selected Users Contents				
Account NAVEX Global ~	*Breen, Darren (Sales Rep)				
<ul> <li>*Breen, Darren (Sales Rep)</li> <li>Gifford, Tawna (Shipping Manager)</li> <li>Woo, Josh (Product Technician)</li> </ul>	Gifford, Tawna (Shipping Manage				

- c. (Optional) Repeat steps a. and b. to select contacts from a different account.
- To include all contacts from all accounts in the currently selected site, click All Contacts.
- To include only those contacts designated as account representatives for all accounts in the currently selected site, click All Account Representatives.
- 6. (Multi-site group only) Select a different site, and then repeat step 5 to select additional contacts.
- 7. Click Save.

#### **Enabling Third-Party Contact Assignments in a Template**

A third-party contact can be assigned as a writer, reviewer, or reader when creating a document. However, a document owner can assign third-party contacts to a document only after you enable that functionality in the template assigned to that document.

**Important:** Do not enable third-party contacts for a template used to create sensitive documents. This will help avoid document owners from accidentally or maliciously assigning third-party contacts to those documents.

- 1. Click **PREFERENCES**.
- 2. Click Document Setup, and then click Templates.
- 3. Do one of the following:
  - Click an existing template to open it.
  - Click New Template, type a title, and then click Save.
- 4. In step 1. Template Setup, click Optional Settings.
- 5. On the **Third-Party Accounts** line, select the **Enabled** check box.

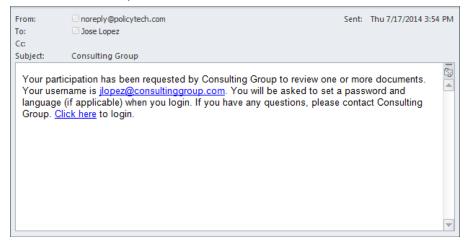
Blank Word Document v.1		Save and Close Options			
Edit Document Properties Wizard		Template			
Steps					
1. Template Setup	(Title, Document Type, Sites)				
2. Category Types					
3. Writers	Optional Settings				
4. Reviewers	Document Review Interval	Every 12 months from approve/last reviewed date		~	0
5. Approvers	Warning Period	Warn 2 month(s) before Review Interval.		~	0
6. Readers	Publication Date	Publish the document as soon as it gets approved.		~	0 🔺
7. Security	Email Notifications	Maximum	V Hide	Lock	0
8. Advanced Routing	Editing Document	Inside the Browser	⊻ 🗹 Hide	Lock	0
Step Instructions:	Available To	Custom Selection (Document Owners)	<ul> <li>Select</li> </ul>	t Users	0
Before writing your template, please provide	Mark as Read Text			0	0
the basic settings below - then click "Next Step." Or,		(Leave empty to use the <u>default text.</u> ) Expand Textbox		~	
once you are done with this step, you can click	Third-Party Accounts	Enabled 0			
Edit Document to work on it immediately. You may		4			
then come back to this wizard later to finish					
setting the Properties.					
		Save Edit Document Next Step			

- 6. (Optional) If this is a new template, finish setting up the template.
- 7. Click Save and Close.
- 8. Inform document owners that the template is available for assigning thirdparty accounts to a document.

**Important:** If you modified an existing template that has already been assigned to documents, document owners must reapply the template before they can assign third-party contacts. Refer document owners to "Changing or Reapplying a Document Template" in the <u>User's Guide</u> for detailed instructions.

# About the Welcome Email

The first time a task, such as reviewing or reading a document, is assigned to a third-party contact, a special introductory email is sent to the contact. The email includes your company name as the task requester and login instructions, as shown in the example below.



## **Resending a Welcome Email**

If a third-party contact can't find or has deleted the welcome email, you can resend it.

- 1. Click **PREFERENCES**, click **Third-Party Setup**, and then click **Account Manager**.
- 2. Click an account to view its contacts, and then click a contact.
- 3. In the Edit Contact window, click Resend Welcome.

**Note:** If you don't see the **Resend Welcome** button, then this contact has not yet been assigned a PolicyTech task.

Edit Contact	٥			
Unique Contact ID*	ng.djohnson			
First Name*	Douglas			
Middle Name				
Last Name*	Johnson			
Email Address*	djohnson@com			
Department*	Sales			
Job Title	Account Rep			
Language	English (English)			
Account Rep				
* - Required Fields				
Save Contact Resend Welcome Cancel				

# **Using Third-Party Contact Features**

If you are a document owner and need to assign third-party contacts to write, review, or read a document, see <u>Assigning Tasks to a Third-Party Contact</u>.

If you are a third-party contact who has been assigned to write, review, or read a PolicyTech<sup>™</sup> document, see the following sections:

Completing a Task as a Third-Party Contact

Logging In Directly to PolicyTech as a Third-Party Contact

# **Assigning Tasks to a Third-Party Contact**

If the **Third-Party Accounts** module has been enabled in PolicyTech<sup>™</sup>, you can assign third-party contacts as writers, reviewers, and readers when you create a document.

**Important:** Before you can assign third-party contacts to a document, that document must be assigned a template with **Third-Party Accounts** enabled. Your document control administrator can tell you which templates have **Third-Party Accounts** enabled.

1. Create a new document (see "Creating and Working with Draft Documents" in the <u>User's Guide</u> for help) or open a draft document.

**Important:** If you opened an existing draft document, you may need to reapply the current template or assign a different template for **Third-Party Contacts** to be available. See "Reapplying a Template to a Document" in the <u>User's Guide</u> for help.

- 2. Click one of the following wizard steps: **3. Writers**, **4. Reviewers**, **6. Readers**.
- 3. In the **Site** list, click a site to which one or more third-party contacts are assigned.
- 4. Click the Third-Party Contacts tab.

Accounts Payable a	nd Cash Dist v.1 😭		Submit to Writers
Edit Document	Properties Wizard Overview	v Edit Questionnaire	Status
Steps       * = Re         1. Settings         2. Departments & Categories         3. Writers         4. Reviewers         5. Approvers         6. Readers         7. Security         8. Advanced Rout		Groups	d-Party Contacts Sele

- 5. Do one or both of the following:
  - In the Account list, click an account to display its contacts, and then select the check boxes of one or more contacts.

Site Corp	oorate Headquart	ers	~	]		
Departmen	ts Job Titles Re	aders Third-Party Contacts		Selected I	Jsers	
Account	Select/Search	an Account	<b>x</b> ~	1		
	Account Name	Address		City	State	Country
	NAVEX Global	6000 Meadows Road Suite	200	Lake Oswego	OR	USA
ite Corp	orate Headquarte	aders Third-Party Contacts	~			
Account	NAVEX Glob	al	~			
Third-Pa	rty Contact Group	)S	÷			
Third-Pa	rty Contacts		~			
🍈 🗍 Gif	reen, Darren (Sales ford, Tawna (Shipp 50, Josh (Product T	ing Manager)				

**Note:** The names of contacts designated as account representatives are marked with an asterisk (\*).

• Click the **Third-Party Contact Groups** bar, and then select the check boxes of one or more groups.

Site Corpora	te Headquarters	~	
Departments	Job Titles Readers Third-Party Contacts		
Account	Select/Search an Account	$\sim$	
Third-Party	Contact Groups	~	
Multi-Site (Global) Groups     Gorporate Headquarters     All Third-Party Account Reps     All Third-Party Contacts			

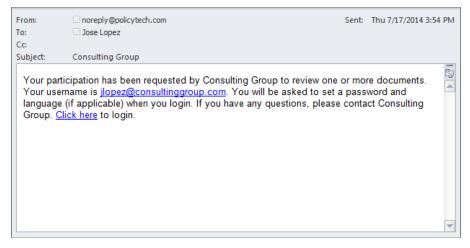
**Note:** Your document control administrator may or may not have created third-party contact groups.

7. Click Save.

# **Completing a Task as a Third-Party Contact**

The email you receive when you're assigned to read, write, or review a PolicyTech document depends on whether or not you have logged in to PolicyTech before.

If you've never logged in to PolicyTech, you'll receive a task assignment email similar to the one below. If your task email looks like this, go to Logging in for the First Time.



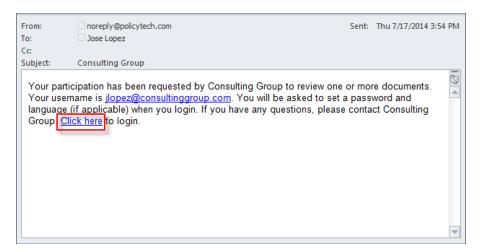
If you have logged in to PolicyTech before, you'll receive an email similar to the one below. If your task email looks like this, go to <u>Responding to a Task</u> Assignment after Initial Login.

From:	donotreply@policytech.com	Sent: Fri 4/26/13 2:07 PM
To:	Jason Barnett	
Cc:		
Subject:	Review required: "Corrective-Preventive Action Form"	
From: N	AVEX Global	
Jason,		
Susan H	oward submitted "Corrective-Preventive Action Form" for your review.	
Click the	document title above to accept, decline, or make revisions to the document.	
Notes:		
-None-		
Login:		
Your us	e <b>rname is <u>[barnett@policytech.com</u> be required to set your password upon initial login.</b>	
100 Will	be required to set your passivord upon initial logill.	

# Logging In for the First Time

To log in for the first time and see your task assignment,

1. In the email you received, click the **Click here** link.



- 2. Do one of the following, depending on the welcome screen displayed:
  - If your screen looks like the one below, click **Continue**.

Welcome Josh,	
Your participation has been requested by Consulting Group to review one or more documents.	
Press Continue to create your password. If you have any questions, please contact Consulting Group.	
Continue	
PolicyTech policy management software automates the process of authoring, approving and distributing documents and capturing attestation.	
PolicyTech can be used by any industry and by any size organization. <u>Learn More</u>	
NAVEX GLOBAL." The Efficies and Compliance Expenses © NAVEX Global 2013. All Rights Reserved	I.

• If your screen looks like the one below, in the **Choose your language** list, click your preferred language, and then click **Continue**.

Welcome Josh, Your participation has been requested by Consulting Group to review one or more documents. Please select your language below. Press Continue to create your password. If you have any questions, please contact Consulting Group. Choose your language English (English) Continue	
attestation. PolicyTech can be used by any industry and by any size organization. Learn More	
NAVEX GLOBAL" Ne Ethics and Compliance Experts © NAVEX Global 2013. All Rights Reserved	

3. Type a password, type it again to confirm, and then click **Save**.

	YTECH <sup>™</sup> lure Management
Choose Your Pa	ssword
New Password Confirm Password Viev	fford@navexglobal. v password requirements Save
	ivacy Statement   Terms of Use NAVEX Global 2013. All Rights Reserved.

4. Read the task instructions, and then click **Proceed to Document**.

**Note:** If you don't want to see these instructions for future task assignments, select the **Don't prompt again** check box before clicking **Proceed to Document**.

Alert	
Tony Potts from Consulting Group has assigned you as a Writer on this document: Proposal.	
When you are finished, choose one of the following options using the buttons at the top of this window.	
Finished Writing - You have finished your task in creating the document. The document owner will be notified.	
Save and Close - Save the current document and close the browser	
Alert	
Tom Hansen from Consulting Group has assigned you as a Reviewer on this document: Fixed Asset Control.	
When you are finished, choose one of the following options using the buttons at the top of this window.	
Accept - Accept the current version of the document	
O Revise - Return the version to draft and make changes	
Alert	8
Alice Lavin from Consulting Group has assigned you as a Reader on this document: Emergency Notification Procedures.	
When you are finished, choose the following option using the button at the top of this window.	¢.
Mark as Read - Marking the document as read indicates that you have read and understood the entire document.	
Proceed to Document Don't prompt again	

- 5. For further instructions, go to the section listed below that corresponds with your assigned task:
  - "Collaborating on (Helping to Write) a Document (for assigned writers)" in the <u>User's Guide</u>
  - "Reviewing a Document" in the <u>User's Guide</u>
  - "Reading a Required Document" in the User's Guide

## **Responding to a Task Assignment after Initial Login**

If you receive a task assignment and you've previously logged in to PolicyTech,

1. In the email, click the document title to launch PolicyTech.

From:	a donotreply@policytech.com	Sent:	Fri 4/26/13 2:07 PM
To:	Jason Barnett		
Cc			
Subject:	Review required: "Corrective-Preventive Action Form"		
From: NA	/EX Global		
Jason,			
Susan Ho	ward submitted "Corrective-Preventive Action Form" for your review.		
Click the o	document title above to accept, decline, or make revisions to the document.		
Notes:			
notes.			
-None-			
Login:			
	name is <u>ibarnett@policytech.com</u>		
TOU WILL D	e required to set your password upon initial login.		
			_

- 2. PolicyTech opens with the document displayed in a browser window. For further instructions, go to the section listed below that corresponds with your assigned task:
  - "Collaborating on (Helping to Write) a Document (for assigned writers)" in the <u>User's Guide</u>
  - "Reviewing a Document" in the User's Guide
  - "Reading a Required Document" in the User's Guide

# Logging in to PolicyTech as a Third-Party Contact

If a PolicyTech<sup>™</sup> user gives you the web address to PolicyTech, you can log in directly and see all tasks you've been assigned.

**Important:** You must have logged in at least once and set your password before you can log in directly to PolicyTech. If you have not set a password, follow the instructions under <u>Completing a Task as a Third-Party Contact</u> above.

- 1. In a browser, type the PolicyTech web address and then press Enter.
- 2. In the **Username** box, your email address (the one for where you received your first task email).
- 3. Type the password you set when you first responded to a PolicyTech task, and then click **Log in**.
- 4. You should now see a screen similar to the one below, with all of your currently assigned tasks listed under a task type (**Write**, **Review**, or **Read**).

owing documents as	Date Assigned	) Days Elapsed	Date Due	NAVEX G
-	Date Assigned	,	Date Due	
-	Date Assigned	,	Date Due	
In Form (v.2)		Days Elapsed	Date Due	D 1 0
In Form (v.2)			Duic Duc	Days Left
	01/06/2014	0		
ment Reporting (v.1)	01/06/2014	0		Days Left
ement Reporting (v.1)	01/06/2014	0		
<u>-In Form (v.1)</u>	01/06/2014	0		
2		Date Assigned ment Reporting (v.1) 01/06/2014	Date Assigned         Days Elapsed           ment Reporting (v.1)         01/06/2014         0	ment Reporting (v.1) 01/06/2014 0

- 5. To work on a task, click the document title to open the document in a separate browser window. Go to one of the *User's Guide* sections listed below for further instructions.
  - "Collaborating on (Helping to Write) a Document (for assigned writers)" in the <u>User's Guide</u>
  - "Reviewing a Document" in the <u>User's Guide</u>
  - "Reading a Required Document" in the <u>User's Guide</u>
- 6. When you're finished, click **LOG OUT**.