### PolicyTech® 9.5.1 Quick Reference — Writer



Import / Overwrit

Insert Properties

Indock Word Module

Word Module Version

Word Module Log File

Collapse Header Bar

You can collaborate with document owners in creating a document. However, only document owners can modify the document properties and submit the document for review.

## **Access an Assigned Document**

You can access a document in the following ways:

In your email application, open the **Writing collaboration required** message and click the link.

In PolicyTech, click **My Tasks**, find the document under **Collaborate**, and then click the link.

#### In PolicyTech, click Documents, then click Browse. For My Relationship, click Documents I Write, then click OK.

**Note:** The document remains in Collaboration status until the last assigned writer clicks **Finished Writing**. It then returns to Draft status, where you can no longer work on it.

**Note:** If you see the message to the right when you try to open a document, you can choose to have PolicyTech notify you when the document is available, or you can click **OK** to view the document in read-only mode.

Click the document title above to open and edit the document.





 Warning
 X

 You are in read only mode.
 The document is currently checked out by Dougtas Johnson in Corporate Headquarters: Administration.

 Notify me by email when the document is no longer checked out.

## **Collaborate on a Document**

# Microsoft<sup>®</sup> Word or

**Excel® Documents.** You can use the full functionality of Word or Excel to write the document.



Document Info

Company Info

Categories

Dates

User Info

Edit Que

Title

Reference #

Keywords

Supersedes Affected Department(s)

Version Number

Insert Properties. You can insert fields that show document properties. Click Tools, then Insert Properties.

Insert Links. To link to a related document, place the cursor, click Links & Attachments, then Insert Link to Existing Document.

**Discussions.** To start or view a discussion about a document, click the discussion icon.

Finished Writing. To close the document and continue writing later, click Save and Close. Or, click Finished Writing and follow the prompts.



Attachments



