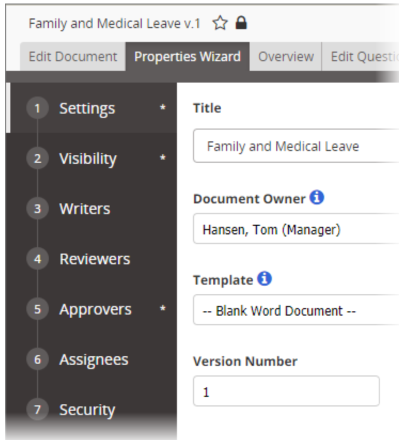
Quick Reference – Document Owner

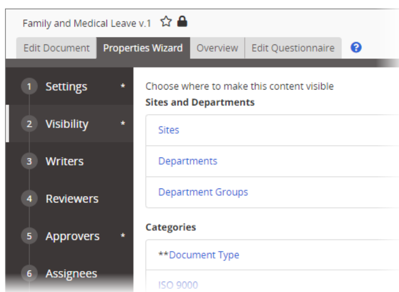
Properties Wizard Setup

Define document properties in 6 steps.

1. **Settings (Required).** Assign a title, owner, and template and adjust the advanced settings to include review interval,warning period, key words,original creation date and the external review date.



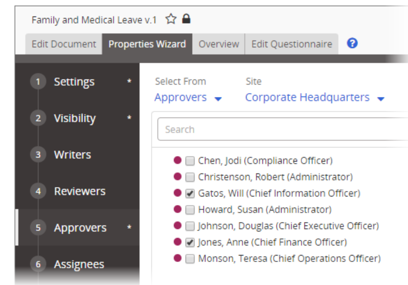
2. **Departments & Categories (Required).** Assign the sites, departments, and categories where the document will be visible.



3. **Writers (Optional).** Select writers to help write the document.

4. **Reviewers (Optional).** Select reviewers to check content and writing style.

5. **Approvers (Required).** Select approvers who determine if the document is ready for publication and take ultimate responsibility for content and correctness.



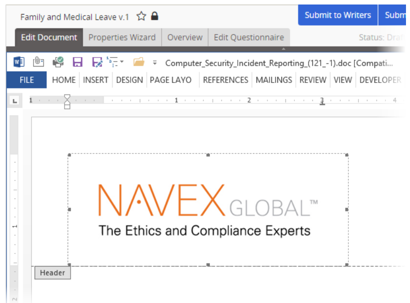
* If the list does not contain the names of writer, review, approver, contact ysm.policy@yale.edu to to have them added to the system.

6. **Security (Required).** Select "public" for all documents.

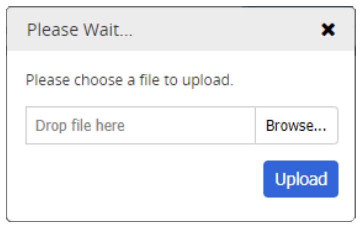
Quick Reference – Document Owner

Edit Document Content

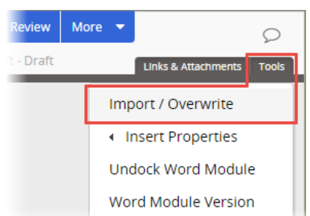
1. Click **Edit Document** to use the full functionality of Word or Excel inside PolicyTech. The template selected in step 1 of the **Properties Wizard** controls the initial content and look of the document and some document properties.



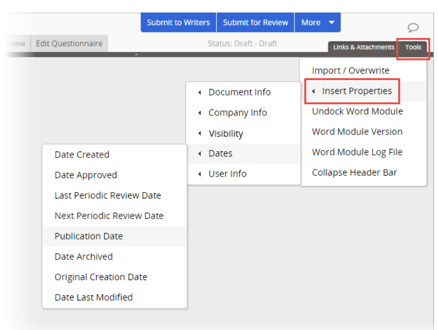
2. **Upload a File.** If this document's template is an **Upload a File** type, use **Browse** to find and select a file, and then click **Upload File**.



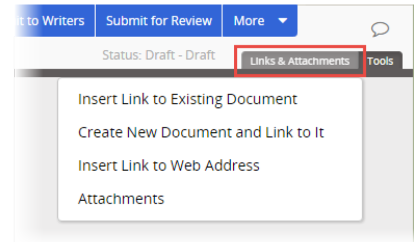
3. **Import/Overwrite.** Selecting this option completely overwrites the current document content with the imported file's content.



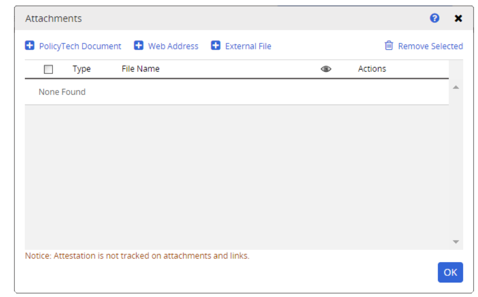
4. **Insert a Properties Field.** From the **Insert Properties** menu under **Tools**, you can insert automatically populated data fields containing document properties, such as the document owner or approval date.



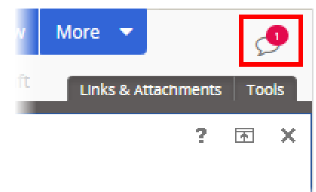
5. **Link to a Document or Website.** Place the cursor where you want a link inserted, click **Links & Attachments**, click a link type and follow the prompts.



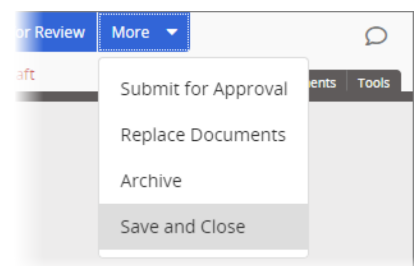
6. **Attach a File.** Click **Links & Attachments**, click **Attachments**, click an attachment type and follow the prompts. An attachment is only accessible from the document containing the link.



7. **Start a Discussion.** You can create and participate in a discussion about this document to reduce the number of review cycles.



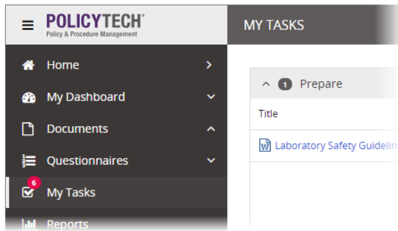
8. **Finish.** You can save and close the document and finish it later. When you're done with the draft submit it to writing, review, or approval.



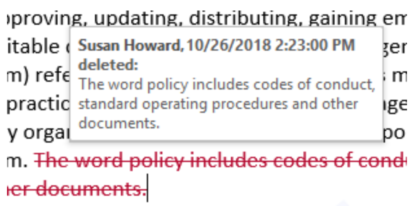
Handle "Track Changes" Feedback

You can quickly view feedback from reviewers or approvers.

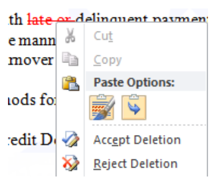
1. **Reviewer or Approver Feedback.** If a reviewer or approver chooses to revise the document, it is sent back to you with an explanation.



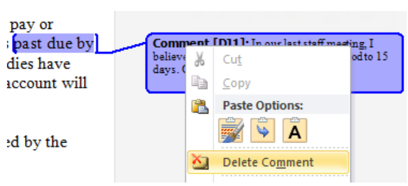
2. **Track Changes.** Changes in a revised document are marked up in colored font. Hover the cursor over a change to see who made it.



3. **Accept or Reject a Change.** Right-click a marked change and click **Accept** or **Reject**.



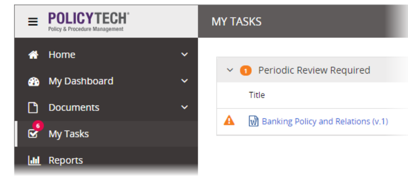
4. **Comments.** Reviewers and approvers have the option of inserting comments when revising a document. After reading a comment, right-click it and click **Delete Comment**.



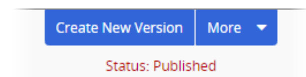
Do a Periodic Review

You may be asked to review a document at specified intervals.

1. **Periodic Review Task.** At a designated time before a periodic review comes due you receive a task assignment in a notification email and in **My Tasks**.

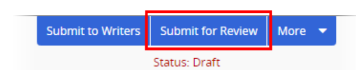


2. **Review the Document.** Check the document to see if changes are needed. If so, click **Create New Version** and click **Yes**.



3. **Make Changes.** The document opens in draft mode where you can make changes to content, **Properties Wizard** settings, attachments, and the assessment.

4. **Submit.** When finished updating, submit the new version for review or approval.



5. **No Revision Necessary.** If you determine that no changes are needed, instead of creating a new version, click **More** and click **No Revision Necessary**, which resets the review date for another period.