Data Fields

This page contains all the data fields that appear on forms and/or reports throughout the program.

Edition Fields

These fields are related to the various Editions of the policy manual.

Edition Name

The name of the Edition. The "Complete" edition is a special edition that includes every policy (except those that have been moved to the trash).

Policy Fields

These fields are related to individual policies.

Title

The policy's title.

%fineprint{Appears in: Table of Contents Form, Add New Policy Form, Policy Detail Form, Review by User Report, Review by Policy Report}%

Summary

A brief description of the policy's contents.

Latest Change

The date of the most recent change to the policy. This field appears in reports and the Table of Contents Form. It is read-only. This date represents the most recent Change Date from the policy's history.

Latest Required Change

The date of the most recent change that users must review for a given policy. This field appears in reports only. It is read-only. This date represents the most recent Change Date from the policy's history for changes marked as "Requires review."

Notes

The Notes highlight policy changes and policies that must be reviewed. They are based on a user's most recent review of a policy compared to the latest change and the latest required change.

Last Reviewed

The date the user last reviewed a policy. This information is saved when a user answers "YES" to the dialog box when Reviewing a Policy.

User Fields

These fields are related to the user records.

User Name

The Windows login name of the user. This is the name the user uses to log on to their computer.

%fineprint{Appears in: Users Form, User Security Report}%

Display Name

The user's name as it should be displayed on reports. Generally, it is the user's first and last name. For example, "John Smith".

%fineprint{Appears in: Users Form, Review by User Report, Review by Policy Report, User Security Report}%

Administrator?

This box is checked if the user should have the role of an Administrator.

%fineprint{Appears in: Users Form, User Security Report}%

Editor?

This box is checked if the user should have the role of an Editor.

%fineprint{Appears in: Users Form, User Security Report}%

Reviewer?

This box is checked if the user should have the role of a Reviewer.

%fineprint{Appears in: Users Form, User Security Report}%

Edition

Default edition for the user. New users are assigned the "Complete" edition by default.

%fineprint{Appears in: Users Form, User Security Report}%

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