Policy Manager

- Policy Manager Overview
- Program Navigation
- Import Policy
- Edit Policy
- Review Policy
- Delete Policy
- Update Page Counts
- Data Fields
- FAQ
- Forms
- Reports
- Search Policies

Policy Manager Overview

This application manages individual Word documents that comprise a much larger policy handbook. The program helps simplify management of these files, but there are a few important things to be aware of.

Managing the Files

The most important thing to remember is that the program keeps track of the actual files. Once you import a file into the program, you should not change its name or save copies of the file in other places.

To make changes to a document, you should go through the Policy Manager program. Policy Manager will open the document in Microsoft Word to allow you to make changes to it. As you make changes, you should use the Save command to save the changes. Do not use the Save As. If you change the document's name, the Policy Manager program will not be able to find it. If you make a copy of the document, Policy Manager will not be aware of the copy.

Deleting Policies

Deleting a policy will never permanently delete anything. The policy will be marked as deleted and removed from the table of contents. The actual Word document will be moved to a special subfolder named *Trash*.

You will be able to restore the policy at any time in the future. Restoring the policy will add it back to the table of contents. It will also fetch the Word document from the *Trash* subfolder.

Reviewing Policies

For any policy to be effective, its intended audience must read it. To help you track this, Policy Manager provides a simple interface for those users. When they open the program, they will see the Table of Contents and a button to review each policy. Clicking on this button will open a read-only copy of the policy document in Word.

When they return to the program, a pop-up box will ask if they have finished reviewing the policy. If they choose Yes, the program will create a record with the user's login, the policy reviewed, and the date and time the review took place. Managers can review reports that show which policies a user has reviewed and which users have reviewed a given policy.

Multiple Editions

Not every policy applies to every employee. To deal with this, you may create multiple *editions* of your policy manual. The **Complete** edition is a special edition that includes every policy.

Here's a quick tutorial:

- Open the Editions Form
- Click on the [New Edition] button
- Enter a name for your new Edition (e.g., "Support Staff") and click [OK]
- Click on the Edit link next to the newly added Edition record
- Check the boxes next to the policy sections you want included in the new edition
- Open the Users Form and assign the new edition to your *Support Staff* employees

Note: *Policies that have been moved to the Trash are not included in the Complete edition.*

From:
https://grandjean.net/wiki/ - **Grandjean & Braverman, Inc**

Permanent link:
https://grandjean.net/wiki/pm/start?rev=1444921775

Last update: **2015/10/15 15:09 UTC**