

# PolicyTech Reference Documents

The screenshot displays the PolicyTech interface for Policy & Procedure Management. The top navigation bar includes the PolicyTech logo, a 'BROWSE' button, and a user profile icon. A left-hand navigation menu contains options like Home, My Dashboard, Documents, Search, Browse (highlighted with an orange arrow), Favorites, Recent, New Document, and My Tasks. The main content area shows a filter for 'All Documents' and a search bar. Below this is a tree view of document categories, with '\_PolicyTech Reference Documents (4)' selected. To the right, a table lists four reference documents with columns for Type, Ref #, Title, Ver #, Status, and Publication Date.

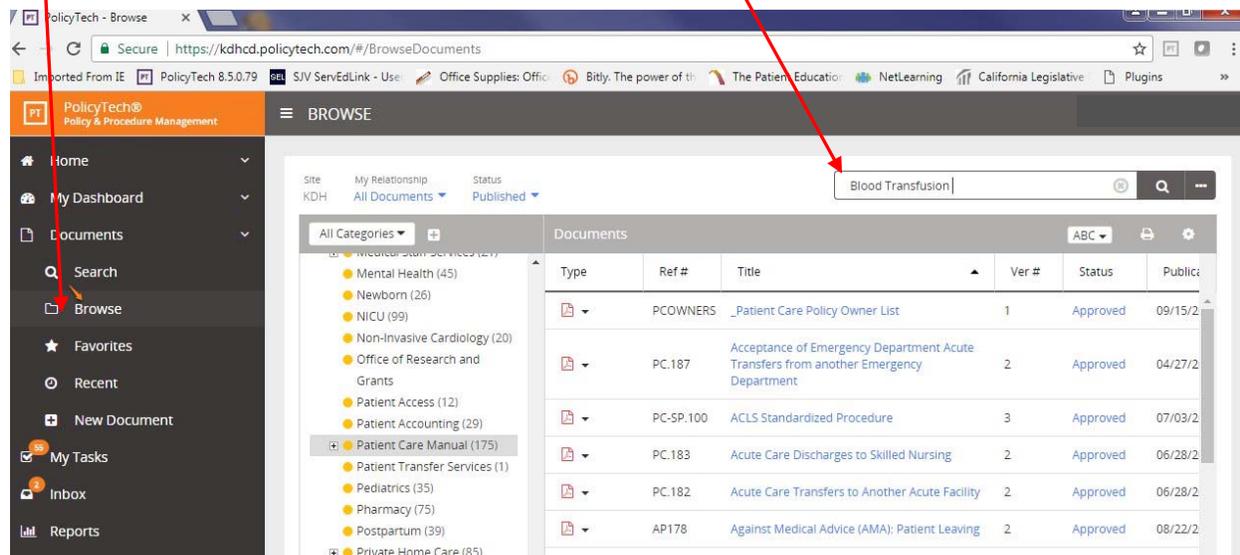
Type	Ref #	Title	Ver #	Status	Publication
	PTQR4	Customizing the User Grid Layout	1	Approved	10/03/2017
	PTQR2	PolicyTech Quick Reference for Readers	1	Approved	10/19/2016
	PTQR3	PolicyTech Training or Software Review Options for Owners/Managers	1	Approved	03/06/2017
	PTQR5	Searching for a policy within a specific manual	1	Approved	10/03/2017

## Search for a policy within a specific manual

Click on Documents, then click on Browse.

Select Manual to search – i.e. Patient Care Manual

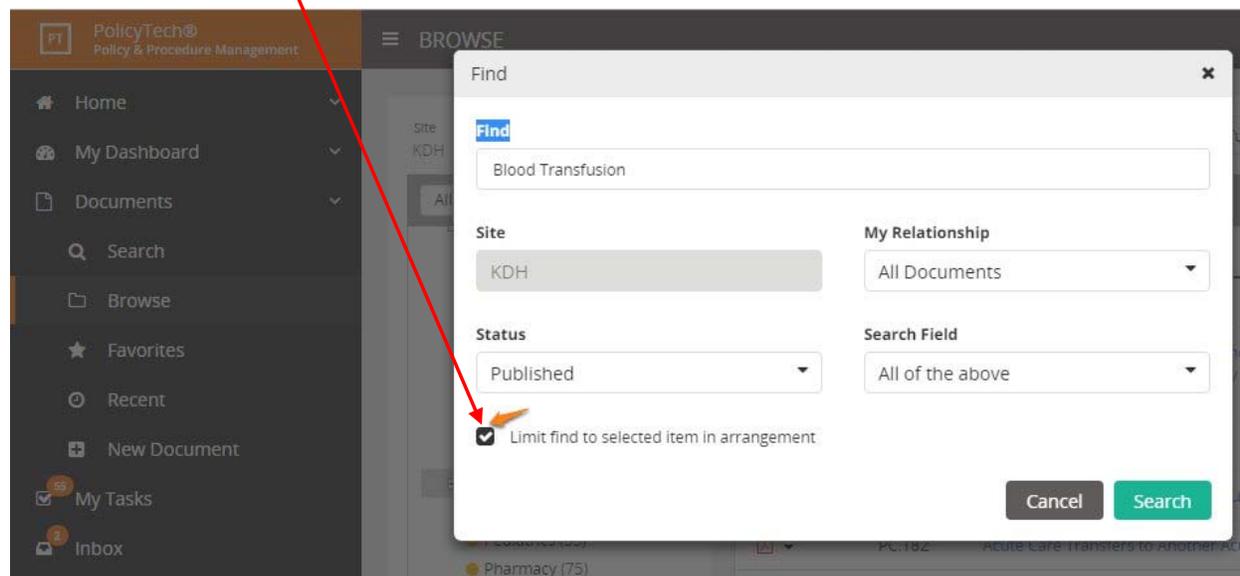
Type in the search word or policy number.



Click on the three dots



Click on “Limit find to selected item in arrangement” This will enable you to search only in the manual selected.



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## Customizing the User Grid Layout

You can add or remove columns from the grid, rearrange and resize columns, and change which column the grid is sorted by. You can also specify how many users (rows) to show per page.

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### Adding or Removing Columns

1. In a user grid, click .
2. Under **Show/Hide Columns**, select or click to clear a check box to show or hide that column.

**Note:** The **Document Roles**, **System Permissions**, and **Manager** columns display shortcut **View** links. Click one of these links to go directly to the corresponding tab of a user's profile.

[Screenshot...](#)

**Note:** To go back to the default user grid appearance, click , click **Reset Column Layout**, and then click **Close**.

3. Click **Close**.
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### Arranging Columns and Changing Sort Order

In a user grid, do any of the following.

**Adjust a column's width:** Hover the pointer over the line between two column headers until the pointer changes to a two-headed arrow, and then click and drag the column separator.

[Screenshot...](#)

 First Name  Last Name  Job Title		
Janice	Aguiar	Accounts Payable Cle
Zoe	Estes	Accounts Receivable
Tom	Hansen	Accounting Manager

**Move a column:** Click and drag a column header over a column separator to display the placement arrows, and then drop the header.

[Screenshot...](#)

 Last Name  Last Name  Job Title		
Janice	Aguiar	Accounts Payable Cle
Zoe	Estes	Accounts Receivable
Tom	Hansen	Accounting Manager

**Select a column to sort by:** Click a column header to sort the user list by that item. An up or down arrow appears in the current sort column.

Screenshot...

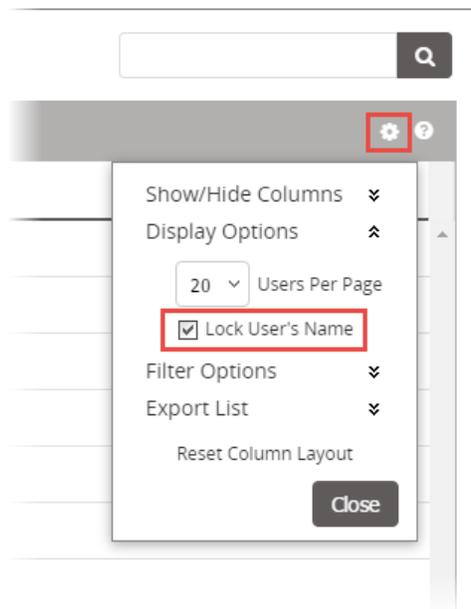
	First Name	Last Name 	Job Title
	Janice	Aguiar	Accounts Payable Cle
	Zoe	Estes	Accounts Receivable
	Tom	Hansen	Accounting Manager

**Change the sort order:** Click the header of the current sort column to reverse the sort order from ascending to descending, or vice versa.

**Freeze the user name columns:** Freezing (or locking) the user name columns (**First Name**, **Middle Name**, and **Last Name**) keeps those columns in place as you scroll to the right and left. If the name columns are not the first columns in the user list, freezing the user name columns will automatically move them there.

1. In a user grid, click .
2. Click **Display Options**, and then select the **Lock User's Name** check box.

Screenshot...

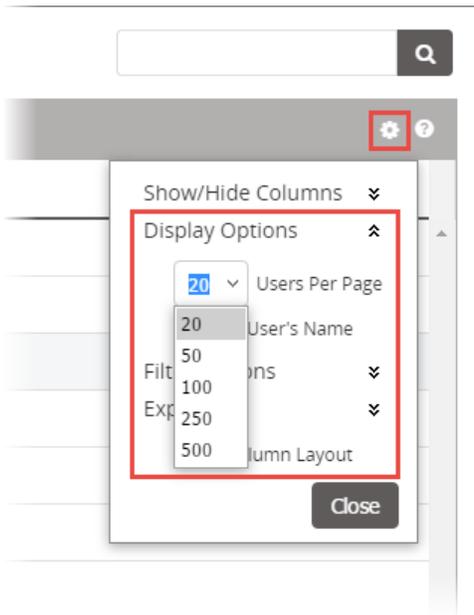


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## Changing the Number of Documents Displayed per Page

1. In a user grid, click .
2. Click **Display Options**, and then for **Users Per Page**, click an option.

Screenshot...



3. Click **Close**.

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## Adding and Viewing Favorite Documents

You can mark a document to add it to your **Favorites** view.

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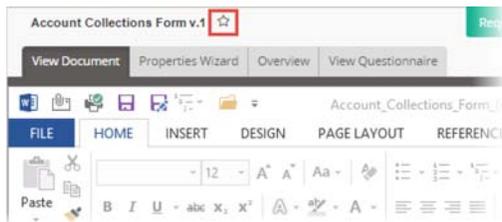
### Adding a Favorite

You can add a favorite in an open document or in a document list.

#### In an Open Document

In the header, click the star after the document title.

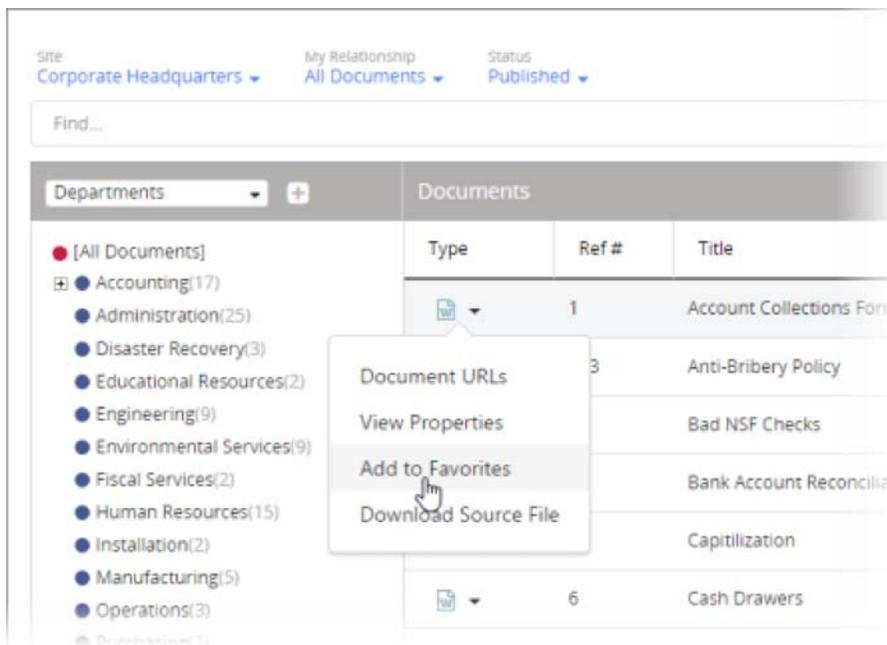
[Screenshot...](#)



#### In a Document List

For a document in a list, click the down arrow in the **Type** column, and then click **Add to Favorites**.

[Screenshot...](#)



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### Viewing Your Favorites List

Click **Documents**, and then click **Favorites**.

[Screenshot...](#)

PolicyTech®  
Policy & Procedure Management

FAVORITES Tom Hansen

- Home
- My Dashboard
- Documents
- Search
- Browse
- ★ Favorites
- Recent
- New Document
- My Tasks
- Reports

NAVEX GLOBAL  
The Ethics and Compliance Experts

Terms of Use | Privacy Statement  
Policy Store

Documents

Type	Title	Ver #	Status
	<a href="#">Overtime Policy</a>	2	Approved
	<a href="#">Safety Guidelines</a>	1	Approved
	<a href="#">Travel and Entertainment</a>	1	Approved
	<a href="#">Vacation Policy</a>	1	Approved

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