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1. Overview

PolicyHub® is the Policy Management software from Mitratech that allows you to control the whole lifecycle of your Policies and Procedures.

It enables and controls the targeted distribution of compliance documentation within an organisation.

1.1. Purpose

The purpose of this guide is to help the distributors of compliance documentation to understand the structure and layout of *PolicyHub* and to assist them in using it effectively and efficiently.

This guide contains detailed information about the menu options and buttons available in PolicyHub and includes examples showing how to use them.

This guide assumes you have a working knowledge of your computer and its operating conventions, including how to use a mouse, standard menus and commands.

1.2. Types Of Compliance Documentation

There are four types of document issued for compliance purposes.

- *Read Documents* – Corporate compliance information that *must be read* by recipients.
- *Test or Questionnaire Documents* – Used to gauge recipients' understanding of corporate compliance information or to gather opinions from recipients.
- *Review Documents* – Issued to an advisory panel for pre-release comments.
- *Reference Documents* – Issued to recipients for reference purpose only.

1.3. Help With Using PolicyHub®

To view PolicyHub's online *Help*, click the *Help* icon on any page.

1.4. System Settings

To view, or change PolicyHub's *System Settings*, click the *Settings* icon on the bottom left of any page.

See "System Settings" on page 89 for further information.

Note: Depending on your PolicyHub licence, *System Settings* may not be visible in the application software.

1.5. About This Guide

This guide describes the options available to a User who has all the available permissions. If you do not have all the available permissions, the options available to you may differ from

those shown. Additionally, certain functions in the PolicyHub menu are only accessible with the appropriate licence. These are indicated in the documentation with a footnote.

1.6. Accessing Menus

There are two ways to access the various menus in PolicyHub:

- Right-click on the required item.
- Select the required item, move the cursor to the right until a black triangle appears and then left-click on the black triangle.

Although the first method is used throughout this guide, either method can be used.

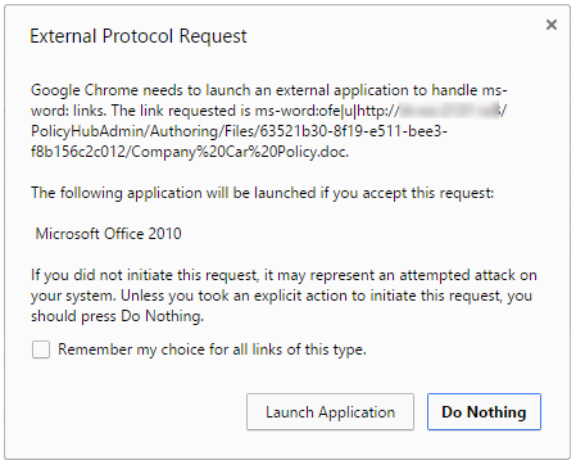
Note: If you right-click on an item or area of the page which does not have an associated PolicyHub menu, the browser's default right-click context menu is displayed.

1.7. Editing And Viewing Word Documents

The first time a user opens a Word document from PolicyHub to view or edit, their browser might block the action.

1.7.1. Chrome

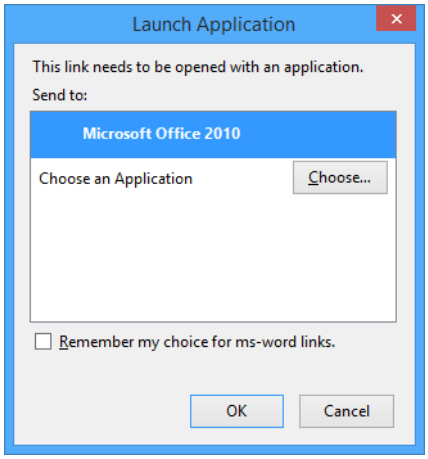
In Chrome, the following dialog is displayed.



Select the option *Remember my choice for all links of this type* and click on the button *Launch Application*. The next time the user tries to open a Word document from PolicyHub, it will be opened in Word.

1.7.2. Firefox

In Firefox, the following dialog is displayed.



If *Microsoft Office i*s displayed (as shown in the example above), select the option *Remember my choice for ms-word links* and then click *OK*.

If Microsoft Office is *not* displayed, click the *Choose* button and browse to the location of the application you want to use to open Microsoft Word documents and click *Open*. You are returned to the *Launch Application* dialog. Select the option *Remember my choice for ms-word links* and then click *OK*.

1.8. Editing Tests And Questionnaires

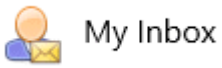
There are three ways to editing question and answer text:

1. Double-click on the question or answer in the tree on the left. The item can then be edited.
2. Right-click on a question or answer and then select an option from the menu.
3. Select the question or answer in the tree on the left and then edit the item's properties in the pane on the right.

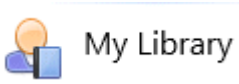
Methods 1 and 2 are used most often in the examples in this guide. However, method 3 is used for properties which can only be edited from the Properties pane.

1.9. Accessing Your Inbox Or Library

This guide describes all the administrator features in the PolicyHub application. However, it is also possible to access you PolicyHub Inbox by clicking the *My Inbox* button.



You can view all the Policies which have been sent to you by clicking the *My Library* button.



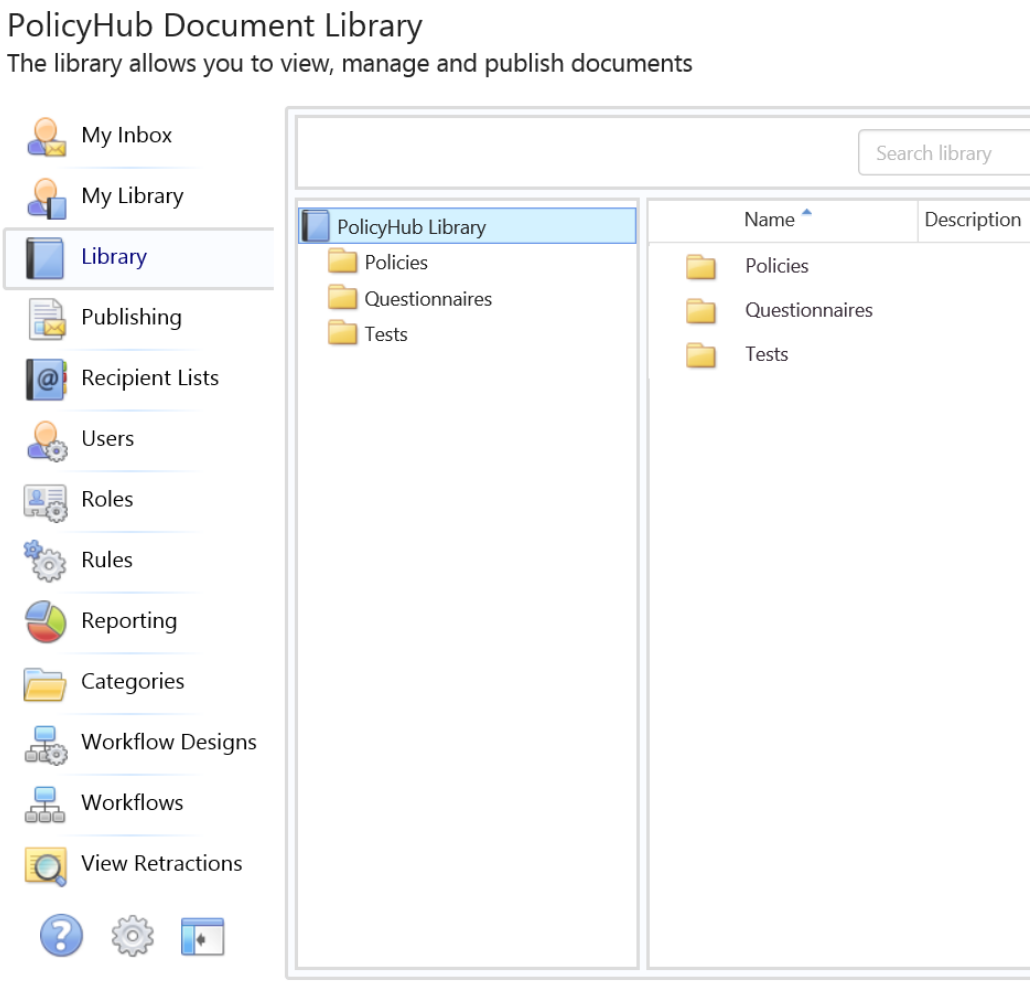
These features are described in the *PolicyHub Inbox Guide*.

Configuration Examples

The following chapters provide configuration examples to help you configure and use PolicyHub.

2. Library Configuration Examples

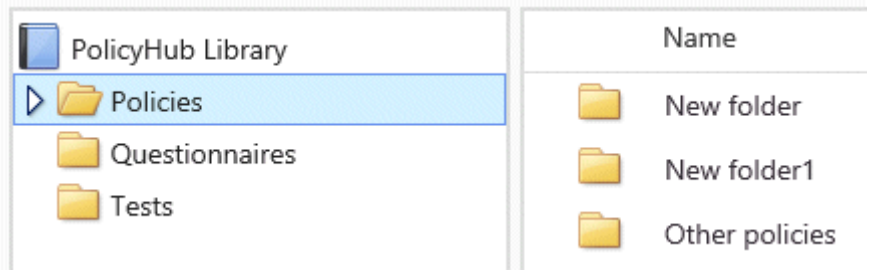
The library is used to store Office and PDF documents, Tests and Questionnaires. These documents can be organised in folders, as required.



2.1. Creating A Folder

Folders are used to organise Documents, Tests and Questionnaires.

1. Right-click on a folder and select *Add folder* from the menu.
2. A new folder named *New folder* is added as a sub-folder of the currently selected folder. The new folder is displayed in the pane on the right. When two or more folders are added, the second and subsequent new folders are numbered.



2.2. Renaming A Folder

1. Right-click on a folder and select *Rename folder* from the menu.
2. Type the new name and press *Enter*.

Note: It is not possible to use any of the following characters in a folder name:
<>?*\ /|"

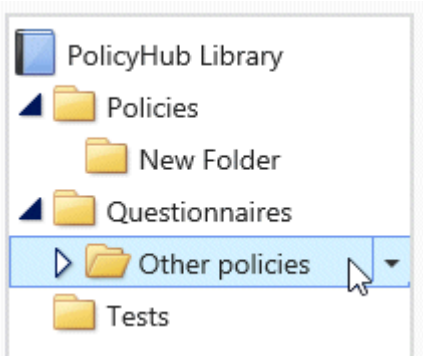
2.3. Deleting A Folder

1. Right-click on a folder and select *Delete folder* from the menu.
2. Confirm you want to delete the folder by clicking *Yes*. Cancel the deletion by clicking *No*.

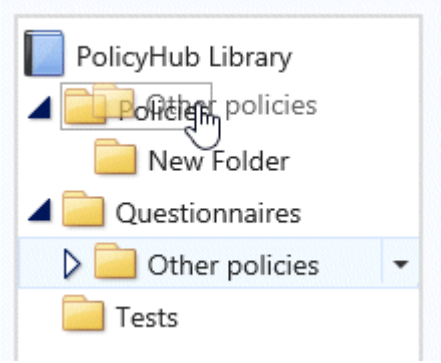
Note: A folder which contains a Published document, Test or Questionnaire cannot be deleted.

2.4. Moving A Folder

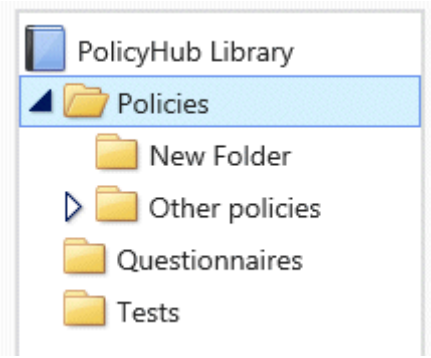
1. In the folder view, click on the folder you want to move (*Other policies* in this example).



2. Drag the folder to the required location (the *Policies* folder in this example).

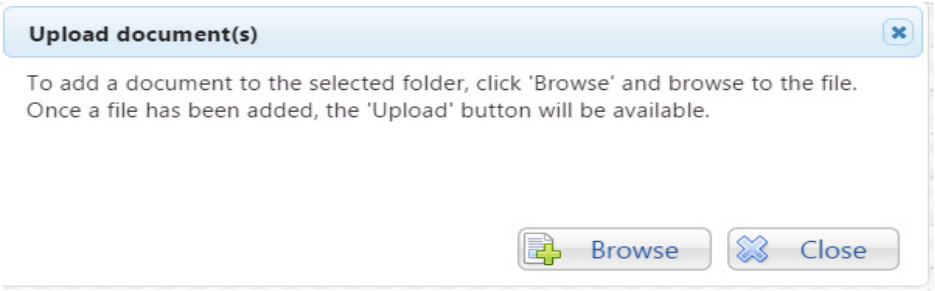


3. The folder is moved to the new location.



2.5. Uploading A Document To The Library

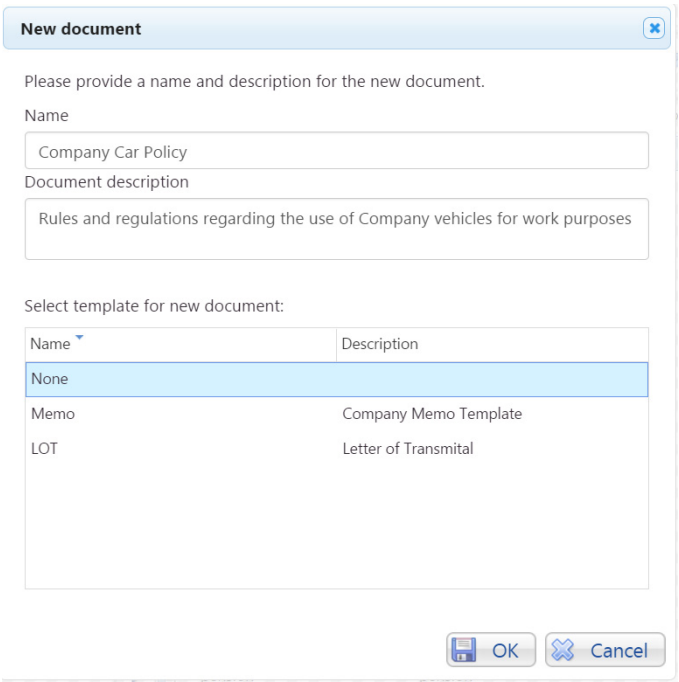
1. Right-click on the folder to which you want to upload the document and select *Upload document(s)* from the menu.



2. Click *Browse* and browse to the location of the file you want to upload to the library, select it and click *Open*. Click *Upload* to upload the file(s), click *Browse* to add another file or click *Close* to cancel the upload.

2.6. Create A New Document In The Library

1. Right-click on the folder to which you want to create the new document and select *New document* from the menu.
2. In the New document window, give the document a name and description.



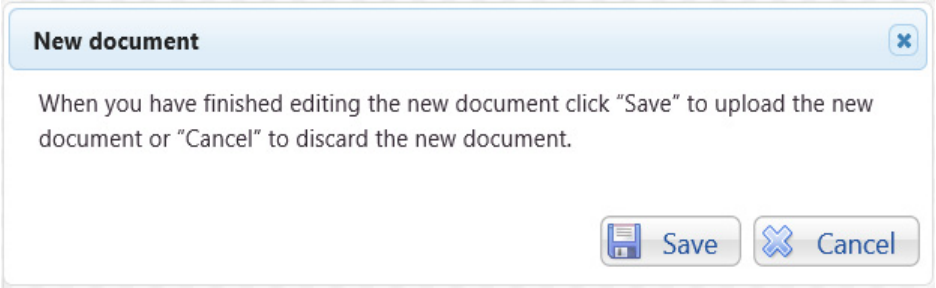
3. If you want to create the new document in a specific template, with predefined page layout, fonts, margins and styles, select the template required in the *Select template for new document* pane. If *None* is selected, the new document will be created from the default template.

Note: Only templates that have previously been uploaded or created in the document library will be visible in the *Select template for new document* pane. See "New Template" on page 95 for more information.

4. Click the *OK* button to create the document. Selecting the *Cancel* button will return you to the document library.

Note: The first time you create a new document, a dialogue will open requesting you to select *Remember my choice for Microsoft® Office for all links.*

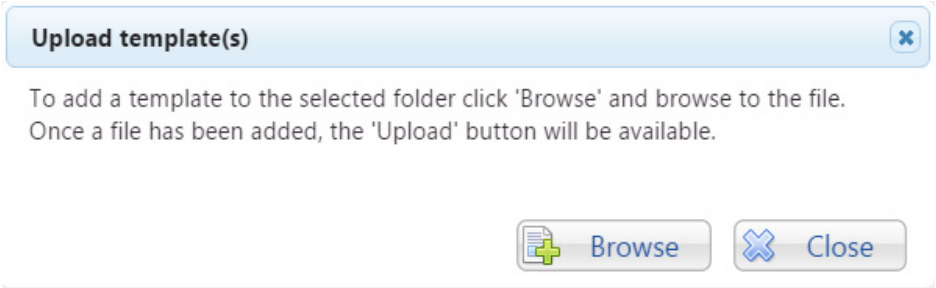
5. Microsoft® Office documents are opened in the appropriate application. When you have completed the document, close the application. PolicyHub will prompt you to *Save* or *Cancel*.



Save will save the document in the chosen folder in the document library. *Cancel* will return you to the document library and will not create a new document.

2.7. Uploading A Template To The Library

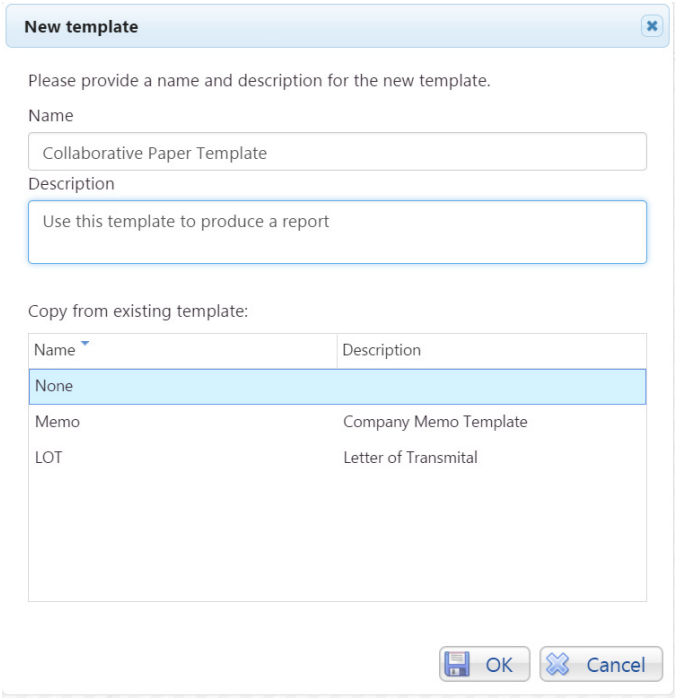
1. Right-click on the folder to which you want to upload the template to and select *Upload template(s)* from the menu.



2. Click *Browse* and navigate to the location of the template you want to upload to the library, select it and click *Open*. Click *Upload* to upload the template(s), click *Browse* to add another template or click *Close* to cancel the upload.

2.8. Create A New Template In the Library

1. Right-click on the folder to which you want to create the new template and select *New template* from the menu.
2. In the New template window, give the template a name and description.



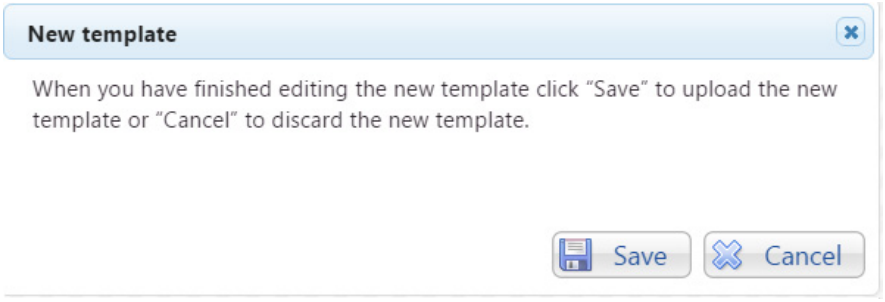
3. If you want to create the new template from a previously created template, select the template required in the *Copy from existing template* pane. If *None* is selected, the new template will be created from the default template.

Note: Only templates that have previously been uploaded or created in the Document library will be visible in the *Copy from existing template* pane. See “New Template” on page 95 for more information.

4. Click the *OK* button to create the template. Selecting the *Cancel* button will return you to the template library.

Note: The first time you create a new template, a dialogue will open requesting you to select *Remember my choice for Microsoft® Office for all links.*

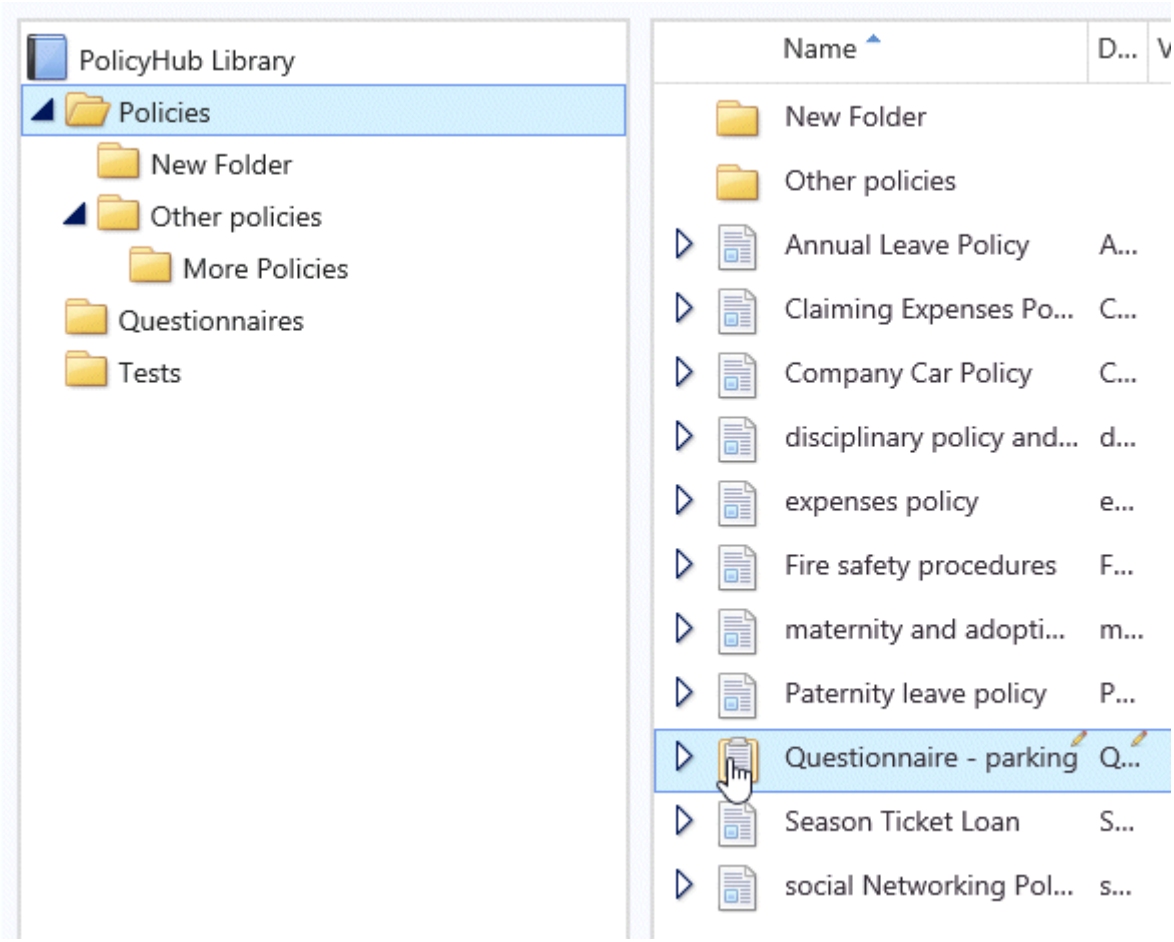
5. Microsoft® Office templates are opened in their appropriate application. When you have completed the template, close the application. PolicyHub will prompt you to *Save* or *Cancel*.



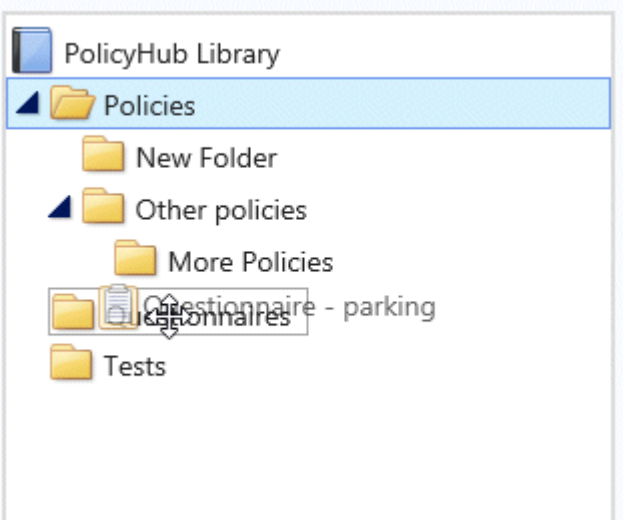
Save will save the template in the chosen folder in the document library. *Cancel* will return you to the document library and will not create a new template.

2.9. Moving A Document, Test Or Questionnaire

1. In the pane on the right, click on the Document, Test or Questionnaire you want to move (*Questionnaire - parking* in this example).



2. Drag the item to the required location (the *Questionnaires* folder in this example).

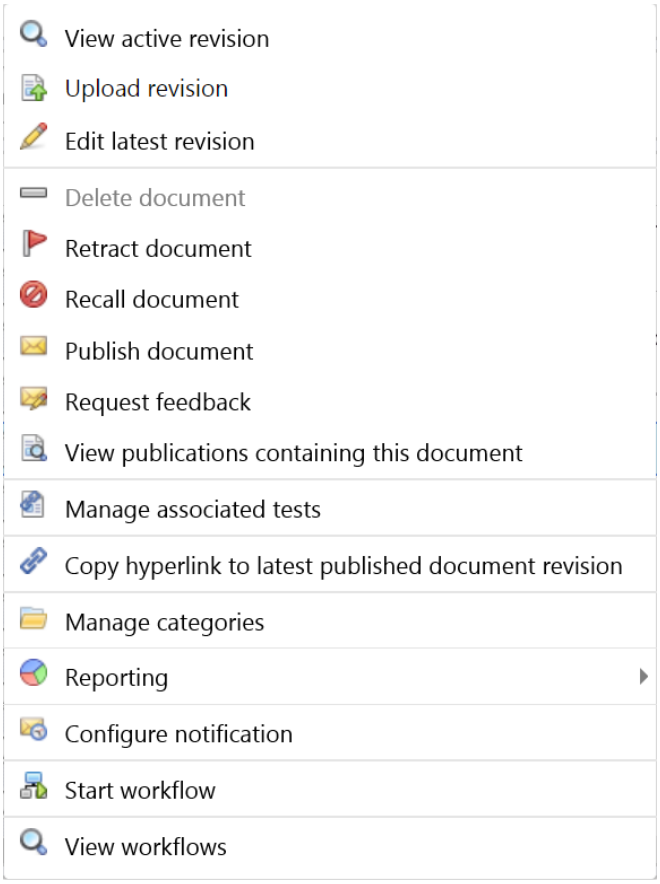


3. The item is moved to the new location.

2.10. Viewing A Document

Note: Only the Active revision of a document can be viewed from the document menu. To view inactive revisions, see "View Revision" on page 135.

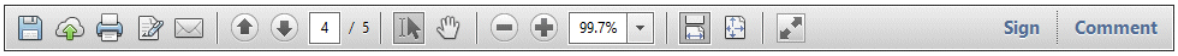
1. Right-click on the document whose active revision you want to view.



2. Select *View active revision* from the menu.

- PDF documents are displayed in the same window.

- In some browsers, you can move the mouse near the bottom of the document to display the PDF viewer toolbar. Click the Acrobat button to add these options to the toolbar. which allow you to easily navigate through the document.

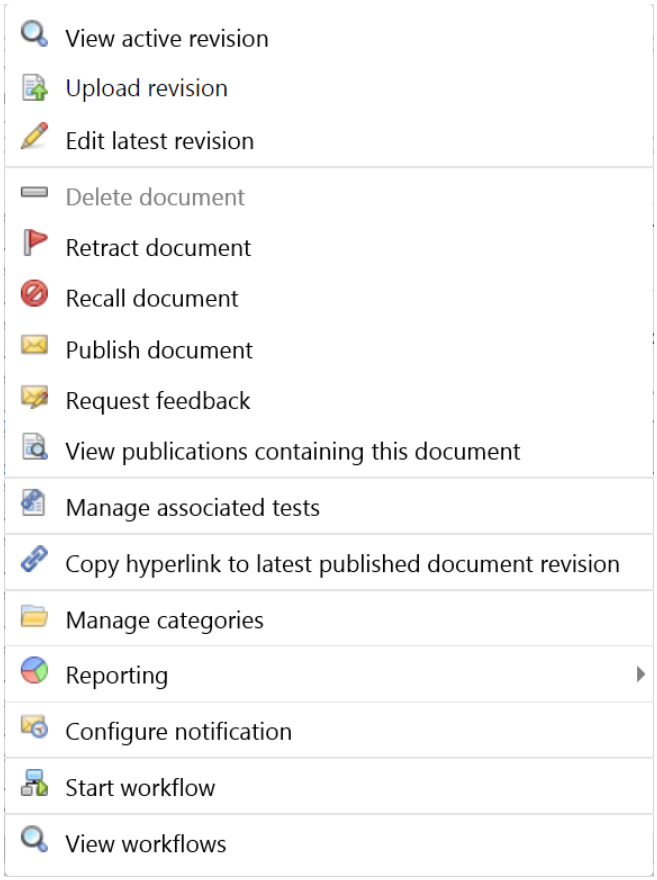


- When you have finished viewing the document, click the *Close* button in the PolicyHub application.
- Office documents are opened in the appropriate Office application.

2.11. Editing A Document

Note: Only the *latest* revision of a document can be edited (when you have the appropriate application on your local machine).

1. Right-click on the Office document whose latest revision you want to edit.



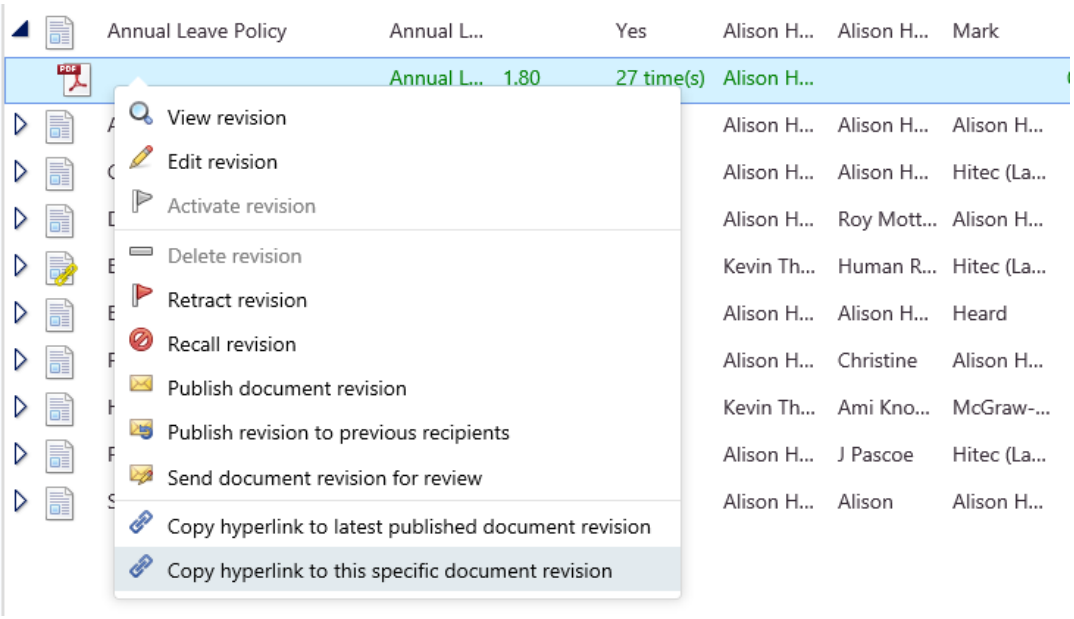
2. Select *Edit latest revision* from the menu. The document is opened in the appropriate Office application.
3. Make the required changes to the document and then save the document and close the application.
4. You are returned to the *Edit latest revision* dialog. Click *Save as new revision* to upload the saved document as a new revision of the original document.
5. The *Document description update* dialog is displayed. Edit the revision description, if required, and click *Save* to save the revision description.
6. The saved document is added as a new revision to the library.

2.12. Copying A Hyperlink To A Specific Document Revision Into A Word Policy Document

This example shows how to copy a hyperlink to the version 1.10 of the *Company Car Policy* and paste it in to the *Expenses Policy*. This will allow a recipient (who has been Published both policies) to open revision 1.10 of the *Company Car Policy* when reading the *Expenses Policy*.

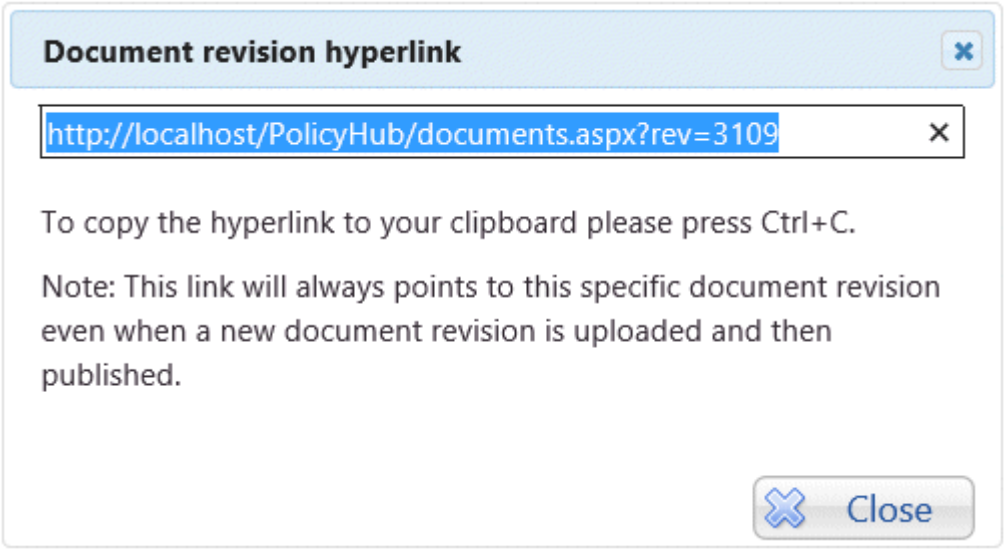
1. On the *Library* page, locate the *Company Car Policy*. Click on the white triangle to the left of the document name to display all the document revisions. Right-click on version 1.10.

2. Select *Copy hyperlink to this specific document revision*.



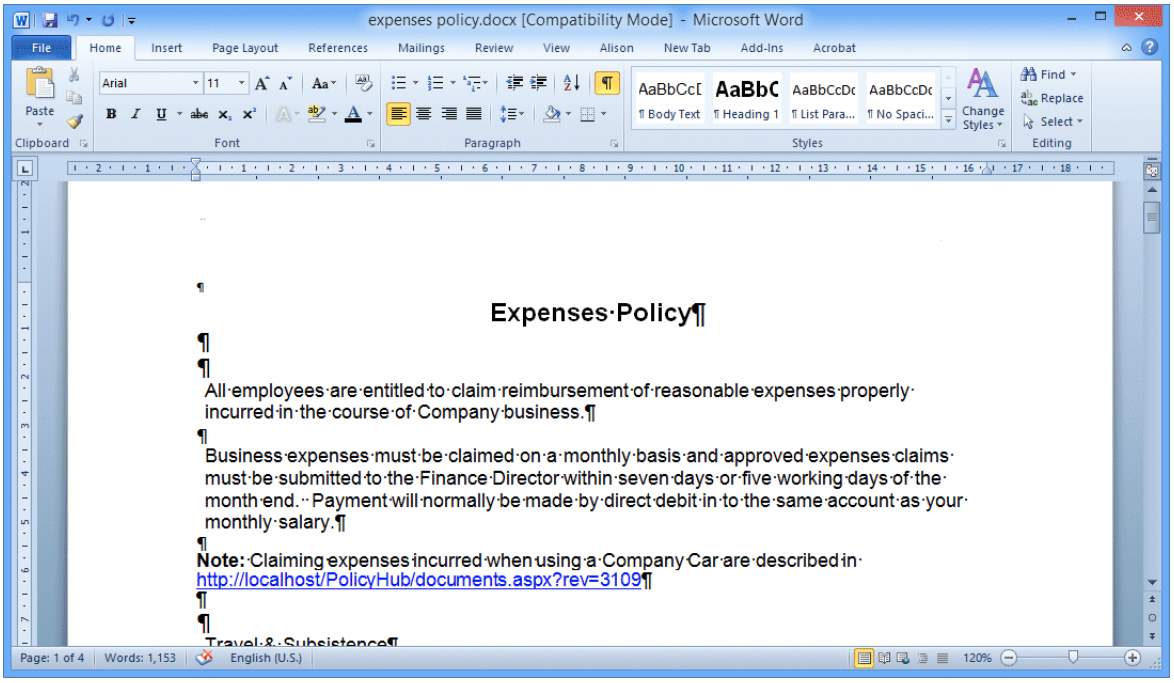
Note: The *Copy hyperlink to this specific document revision* option will always point to the specific document revision of the linked document.

3. Press *Ctrl+C* to copy the selected link to the clipboard.



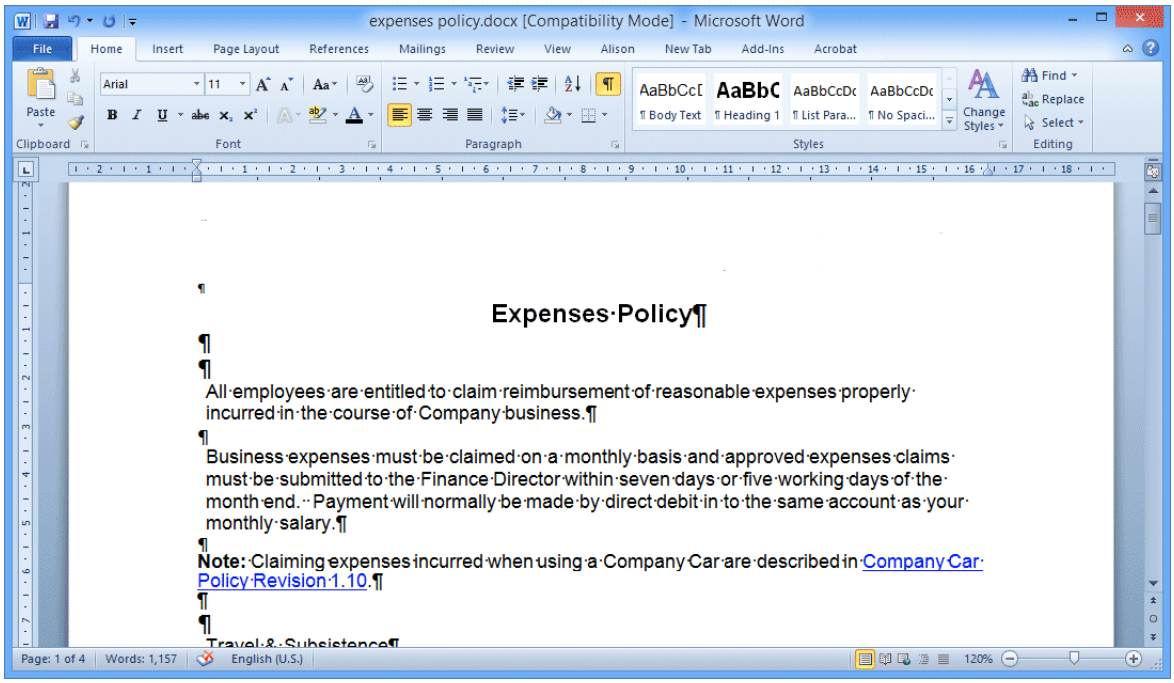
4. Select *Close* to close the dialog box.
5. Locate the Expenses Policy Word document and edit it (see "Editing A Document" on page 14 for an example on how to edit a document in the library).

6. Select an insertion point in the Expenses Policy. Press *Ctrl+V* on the keyboard to paste the hyperlink into the document.



2.12.1. Renaming A Hyperlink (In A Word Document)

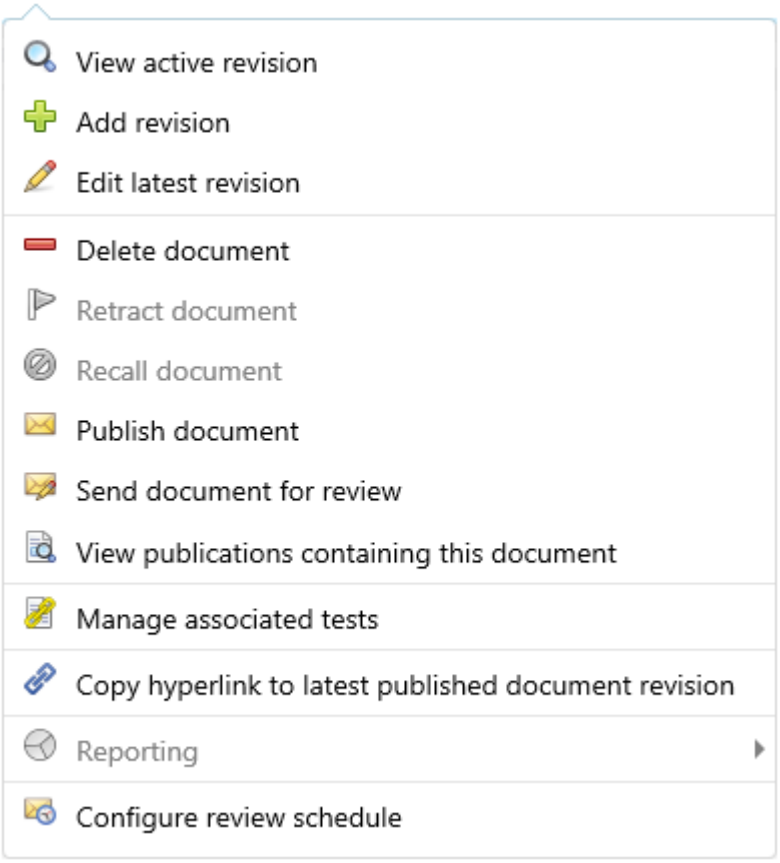
1. Highlight the hyperlink and right-click on it.
2. Select *Edit Hyperlink* from the menu.
3. Type *Company Car Policy Revision 1.10* in the *Text to display* text box.
4. Click *OK* to save your changes.



5. The link now shows the policy name and revision.
6. Save the Expenses Policy and upload it to the library. See “Editing A Document” on page 14 for an example.

2.13. Deleting A Document

1. Right-click on the document you want to delete.



2. Select *Delete document* from the menu.
3. A dialog is displayed asking you to confirm you want to delete the document. Click on the *Yes* button to delete the document or *No* to exit without deleting the document.

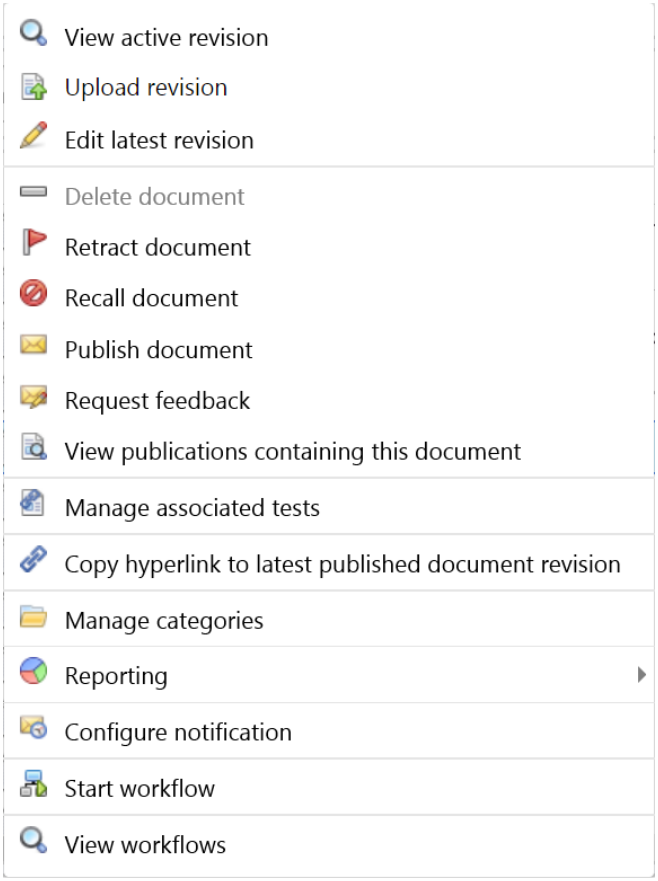
When a document is deleted, all the revisions of the document are deleted.

Note: Only documents which have never been Published can be deleted.

2.14. Retracting A Document From Users' Libraries

When a Document has been published but the document is no longer relevant and you want to remove all the revisions of the document from all the Users to whom it has been Published, use the *Retract document* option.

1. Right-click on the document you want to remove from all user libraries.



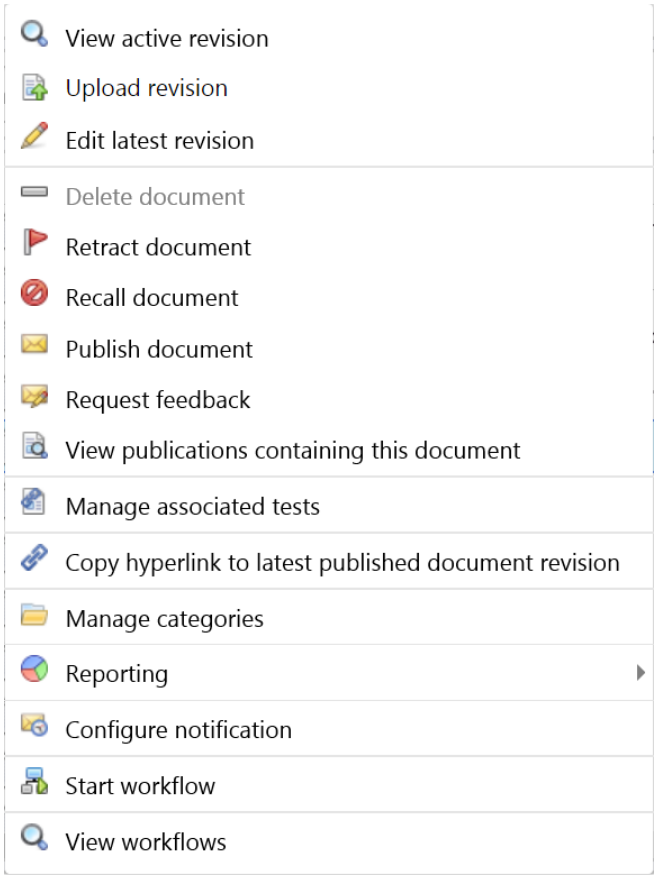
2. Select *Retract document* from the menu.
3. A dialog is displayed asking you to confirm you want to retract the document from all user libraries and allowing you to enter a reason for the retraction. Enter a reason for the retraction in the text box and then click *Yes* to retract the document. This reason will be logged. See "View Retractions" on page 418 for more information.

   To retract a document from an individual user see "Retract Publication For This User" on page 267.

2.15. Recalling A Document From Users' Libraries

When a Document has been published in error and you want to remove all the revisions of the document from all the Users to whom it has been Published, use the option *Recall document*.

1. Right-click on the document you want to remove from all user libraries.

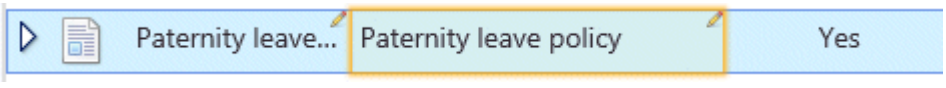


2. Select *Recall document* from the menu.
3. A dialog is displayed asking you to confirm you want to recall the document from all user libraries and allowing you to enter a reason. Enter a reason for recalling the document in the text box and then click *Yes* to recall the document. This reason will be logged. See "View Retractions" on page 418 for more information.

   To recall a document from an individual user see "Recall Publication For This User" on page 268.

2.16. Editing A Document's Details

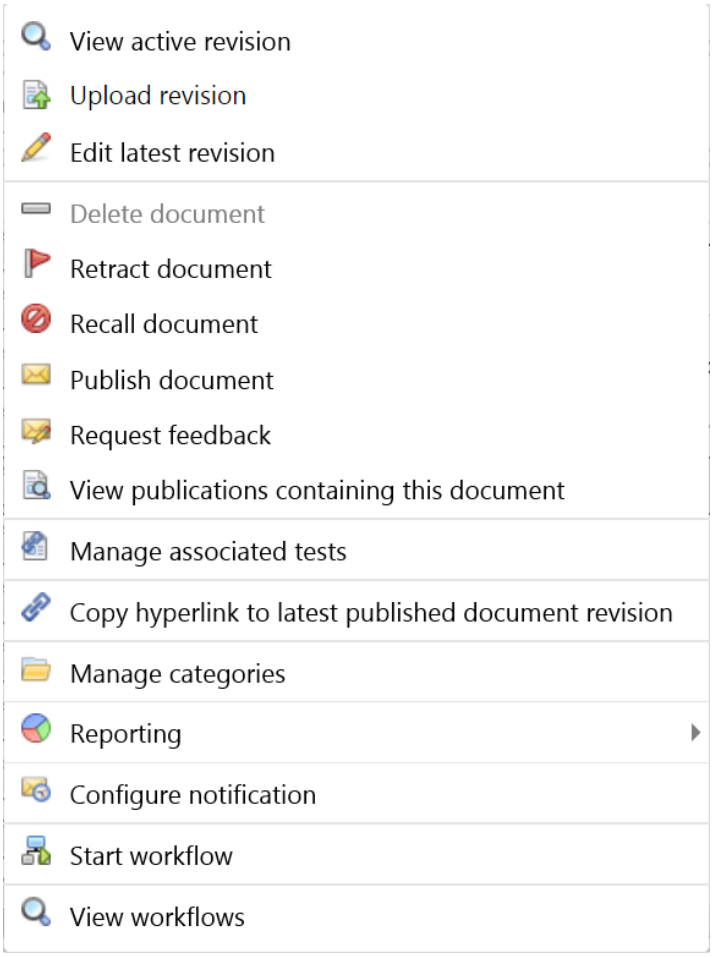
1. Open the folder containing the document whose details you want to edit.
   The following fields can be edited:
   - Name
   - Description
   - Source
   - On behalf of
   - Classifications (see "Editing The Classifications" on page 133 for information about editing Classifications)
2. Double-click on a cell which contains the pencil icon to edit that field and make the required changes. In this example, the document description has been selected. The pencil indicates it is editable. To edit the description, double-click in the cell.



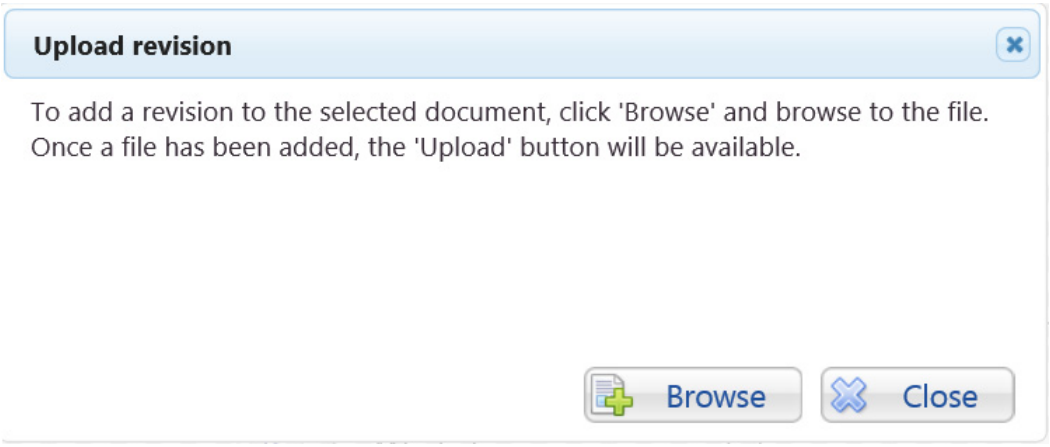
3. Click away from the field you are editing to save the changes.

2.17. Uploading A Revision

1. Right-click on the document to which you want to upload a new revision.



2. Select *Upload revision* from the menu. A dialog is displayed.



3. Click the *Browse* button and browse to the new revision of the selected document.
4. Click *Open* and then click the *Upload* button. The file is uploaded as a new revision of the document. This new revision appears at the top of the list of document revisions for the selected document and becomes the *Active* revision.

2.18. Editing The Details Of A Document Revision

1. Click on the white triangle beside the document to display the document revisions.
2. Select the document revision whose details you want to edit.

3. The following fields can be edited:

- Description
- Version

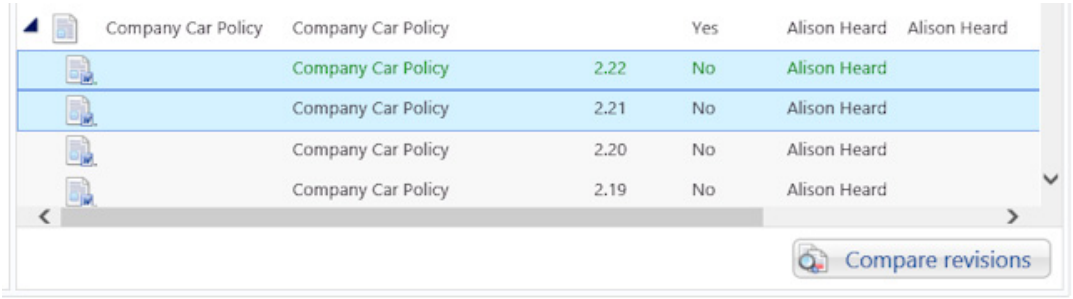
Note: You cannot edit the details of revisions which have been Published.

4. Double-click on a cell which contains the pencil icon to edit that field and make the required changes. Click away from the field you are editing to save the changes.

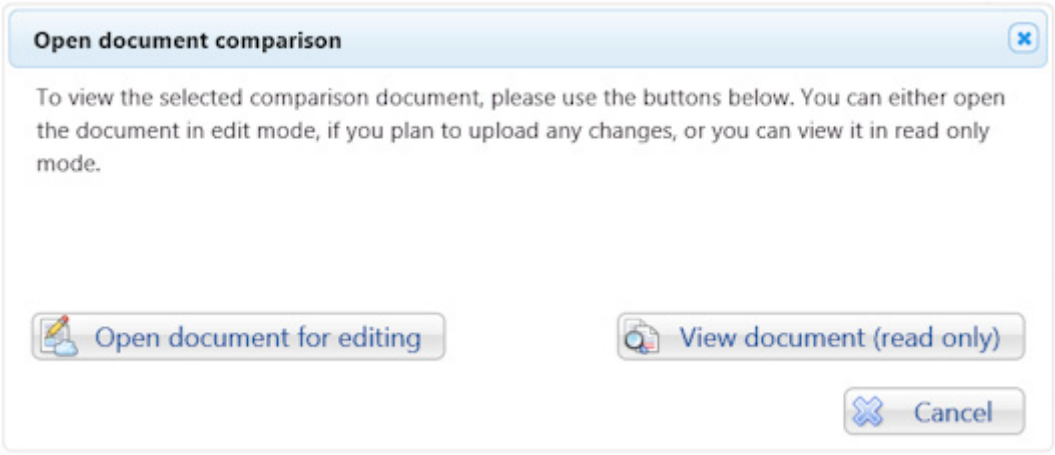
2.19. Comparing Document Revisions

Two or more revisions of the same Word Document can be compared to show the differences between them. This example shows how to download the comparison document, edit it, then upload the edited document as a new revision.

1. Click on the document revisions you want to compare while holding down the *Ctrl* key. In this example, two revisions have been selected. The *Compare revisions* button is displayed at the bottom of the pane.



2. When the *Compare revisions* button is clicked, the *Open document comparison* dialog is displayed.

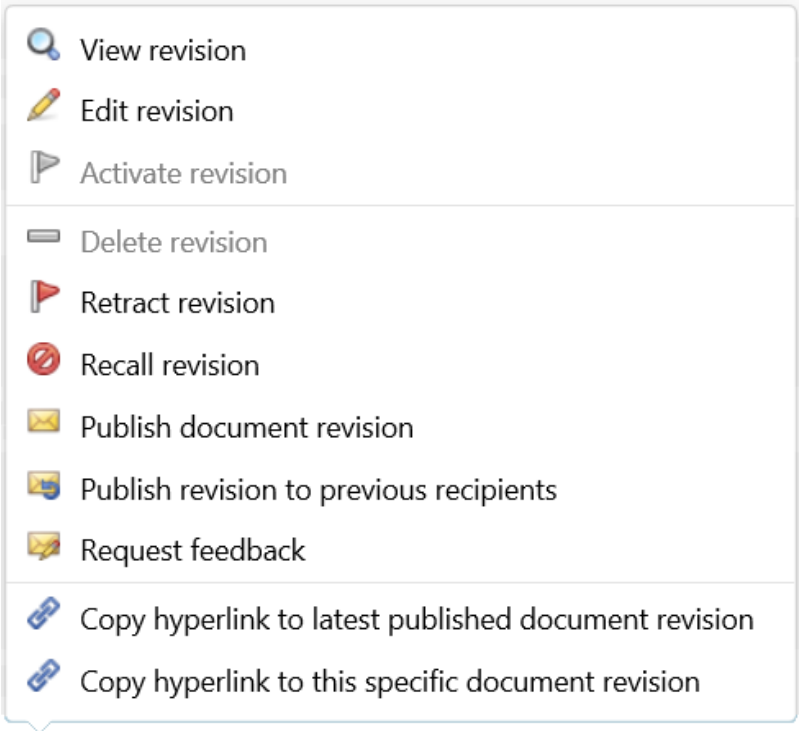


3. Click the *Open document for editing* button to open the comparison document for editing in Word.
4. You are returned to the *Open document comparison* dialog. Click *Save as new revision.* The edited comparison file has now been added as a new revision to the documents you compared.

2.20. Retracting A Document Revision From Users' Libraries

When a revision of a document has been published but is no longer relevant and you want to remove it from all the Users to whom it has been Published, use the option *Retract revision*.

1. Select the document you want to remove from all user libraries. Click the triangle on the left to display all the revisions of the document.
2. Right-click on the revision you want to retract.



3. Select *Retract revision* from the menu.

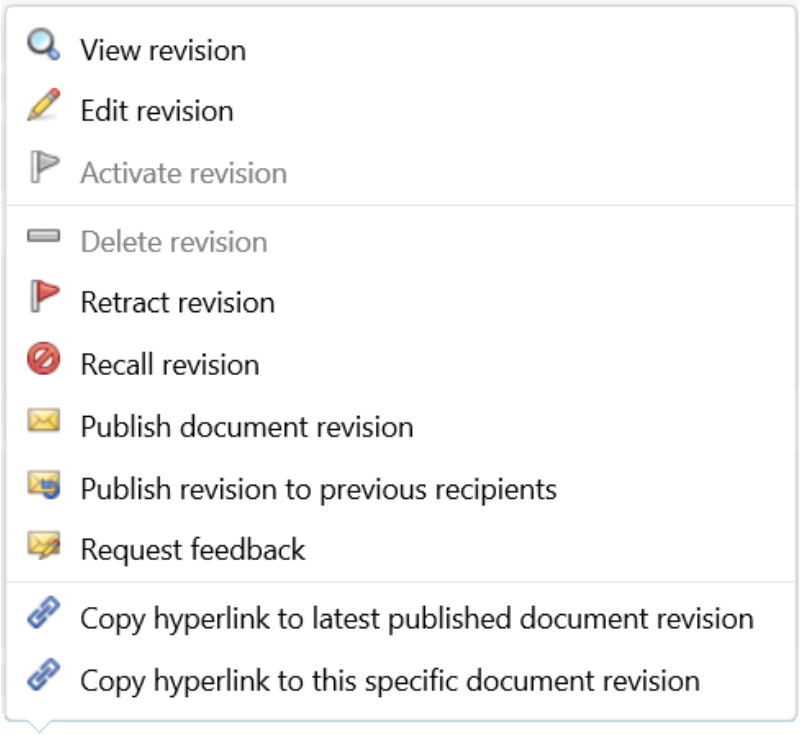
4. A dialog is displayed asking you to confirm you want to retract the document revision from all user libraries and allowing you to enter a reason for the retraction. This reason will be logged. Enter a reason for the retraction in the text box and then click *Yes* to retract the document.

   To retract a document from an individual user see “Retract Publication For This User” on page 267.

2.21. Recalling A Document Revision From Users’ Libraries

When a revision of a document has been published in error and you want to remove it from all the Users to whom it has been Published, use the option *Recall revision*.

1. Select the document you want to remove from all user libraries. Click the triangle on the left to display all the revisions of the document.
2. Right-click on the revision you want to recall.



3. Select *Recall revision* from the menu.
4. A dialog is displayed asking you to confirm you want to recall the document revision from all user libraries and allowing you to enter a reason. This reason will be logged. Enter a reason for recalling the document revision in the text box and then click *Yes* to recall the document.

   To recall a document from an individual user see “Recall Publication For This User” on page 268.

2.22. Searching For Documents Containing ‘Company’ Or ‘Car’

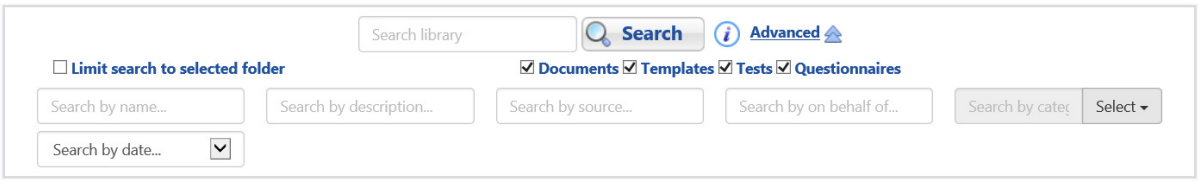
You can search through your PolicyHub library to find items containing specified words.

1. Click in the *Search library* text box.

2. Enter the words *company car* in the search text box.
3. Click the *Search* button.
4. All Documents, Questionnaires and Tests containing the word *company* or the word *car* (or both words) are displayed.

2.23. Searching By Name

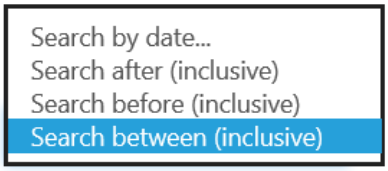
1. Click on *Advanced* to display the advanced search options.



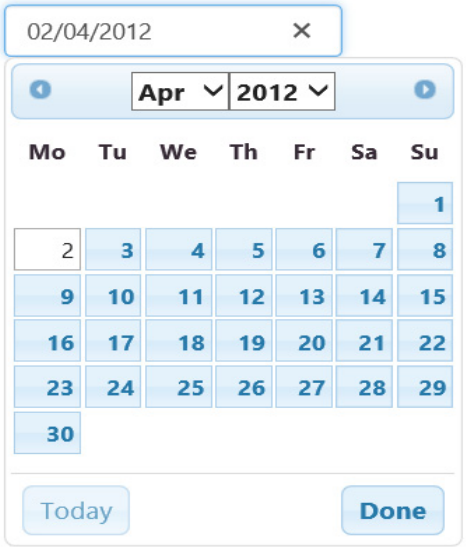
2. Select the tick boxes for *Documents*, *Templates, Tests* and *Questionnaires* to ensure all are searched.
3. Clear *Limit search to selected folder* to search all the folders in the library.
4. In the *Search by name* field, enter *policy.*
5. To start the search, click the *Search* button.
6. The documents (in your PolicyHub library) which have the word *policy* in their name are displayed.

2.24. Searching Based On Date First Added

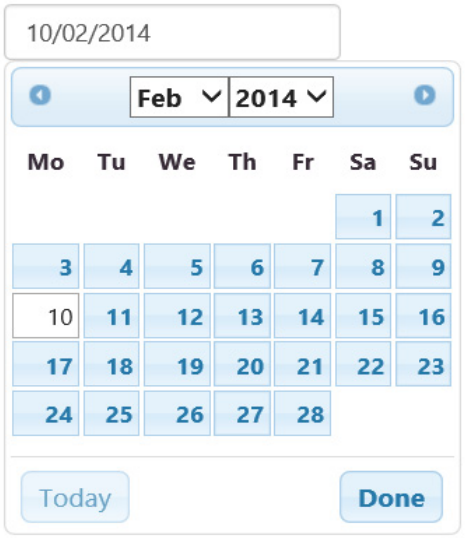
1. To search based on when the items were added to the PolicyHub library (that is, the date a Test or Questionnaire was first created or a Document was uploaded to the library), select *Search by date* and, from the drop-down list, select *Search between (inclusive*).



2. Click in the *Start date* text box and select 1st April of the current year. Next, click in the text box and edit the year so it is 2012.



3. Click in the *End date* text box and select the 10th February 2014 from the calendar. You can use the < and > symbols on the left and right of the displayed month and year to change the currently displayed month and year, as required.



4. The date appears in the text box above the calendar.
5. To start the search, click the *Search* button.
6. The documents (in your PolicyHub library) which were added to the library on or after 1st April 2012 and on or before the 10th February 2014 are displayed.

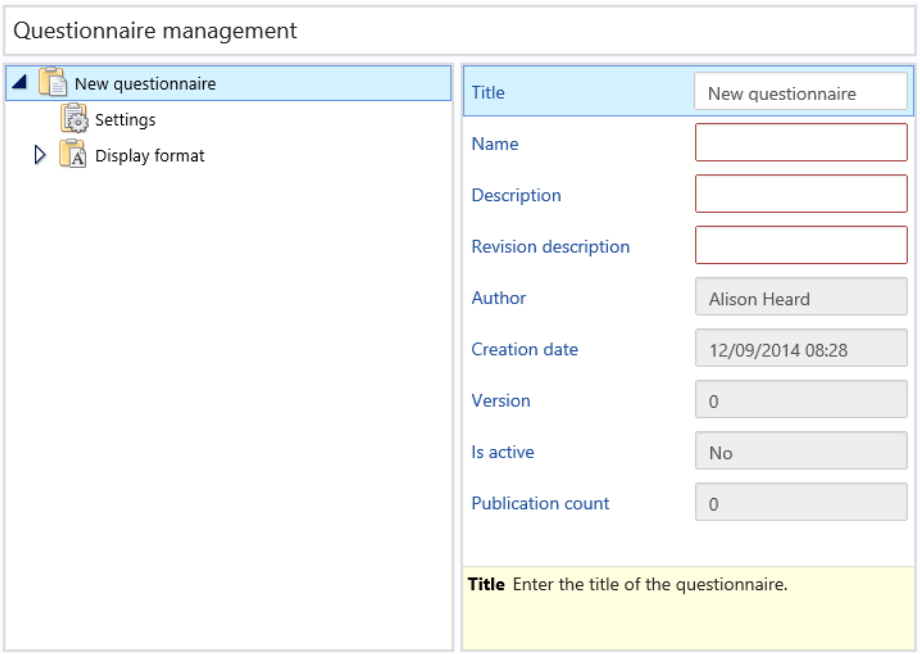
3. Questionnaire Configuration Examples

3.1. Create A Questionnaire With One Selection, One Rating Scale And One Matrix Question

This Questionnaire has one section. All the questions include a list of possible answers. The Questionnaire respondent must choose one answer for each question.

3.1.1. Configure The Questionnaire Properties

1. Select the folder in which you want to store the Questionnaire, right-click on it and select *Create questionnaire* from the menu.



2. Enter a title for the Questionnaire. The title appears at the top of the Questionnaire. The default title is *New questionnaire*. In this example, change it to *Travel & Parking Questionnaire.*
3. Enter a *Name* for the Questionnaire. In this example, *Travel & Parking Questionnaire*.
4. Enter a name for the Questionnaire. This is the name the Questionnaire will be saved as in the library. In this example, enter *Travel & Parking Questionnaire*.
5. Enter a *Description* in the text box. In this example, enter *Travel & Parking Questionnaire*.
6. Enter a *Revision description*. In this example, enter *First revision of the Travel & Parking Questionnaire*.
7. Click *Save* to save the Questionnaire.

Note: If any of these fields are left blank, errors are displayed when you try to save the Questionnaire. These errors must be fixed before you can save the Questionnaire. Validation errors will not prevent the Questionnaire from being saved. However, validation errors must be fixed before the Questionnaire can be Published. See “Validate” on page 215 for more information.

3.1.2. Settings

This Questionnaire will have all the questions on one page. To configure this, set the value for *Questions per page* to *All*.

In the *Start-up comments* text box, type any extra information you want to appear on the start page of the Questionnaire. In this example, leave this blank.

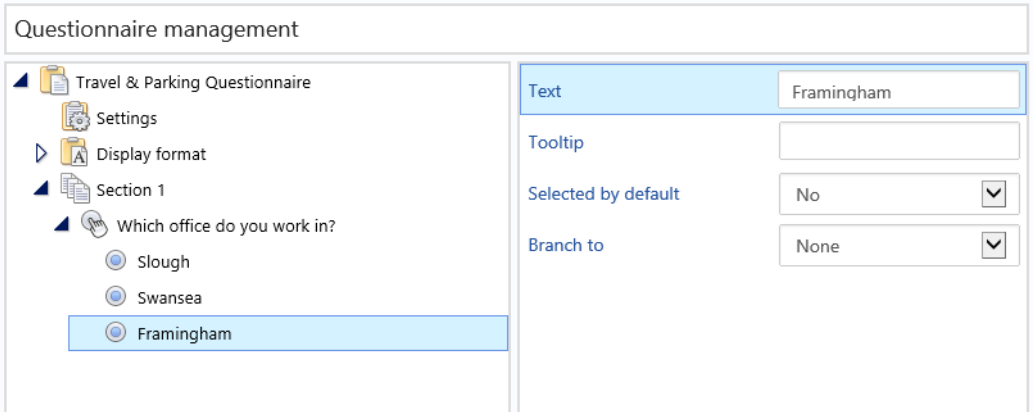
3.1.3. Create Selection Question

1. Right-click on *Travel & Parking Questionnaire* and select *Add a section* from the menu. *Section 1* is added to the Questionnaire.
2. Right-click on *Section 1* and select *Add a selection question* from the menu. *Question 1* is displayed below *Section 1* in the Questionnaire explorer.
3. Double-click on *Question 1* and replace *Question 1* with the required question. In this example, *Which office do you work in?*
4. Click *Save* to save the Questionnaire.

3.1.4. Create The Selection Options

The Selection type answer needs a number of options the Questionnaire respondent can choose from.

1. Right-click on *Which office do you work in?* and select *Add selection option* from the menu. Repeat this until there are three options.
2. Double-click on *Option 1* and change *Option 1* to *Slough*.
3. Double-click on *Option 2* and change *Option 2* to *Swansea.*
4. Double-click on *Option 3* and change *Option 3* to *Framingham*.
5. The Questionnaire should now look like this.



6. Save the Questionnaire.

3.1.5. Create Rating Scale Question

1. Right-click on *Section 1* and select *Add a rating question* from the menu. The *Rating scale templates* dialog is displayed. Select the Rating scale template *Poor to Excellent* from the list of templates. Click *Select*.
2. *Question 2* appears below the question you have already created. Double-click on *Question 2* and replace *Question 2* with *How do you rate your commute to work?*

3. Leave all the remaining settings for this question at their default settings.

3.1.6. Create Matrix Question

1. Right-click on *Section 1* and select *Add a matrix question* from the menu.
2. Double-click on *Question 3* and change it to *How often do you use the following modes of transport when commuting to work?*
3. Double-click on *Child question 1* (the first child question of the matrix) and change it to *Car.*
4. Right-click on *Questions* (above *Car* in the Questionnaire explorer) and select *Add a child question* from the menu. *Child question 2* is added below *Car.* Change *Child question 2* to *Train*.
5. In a similar way, add the following child questions:

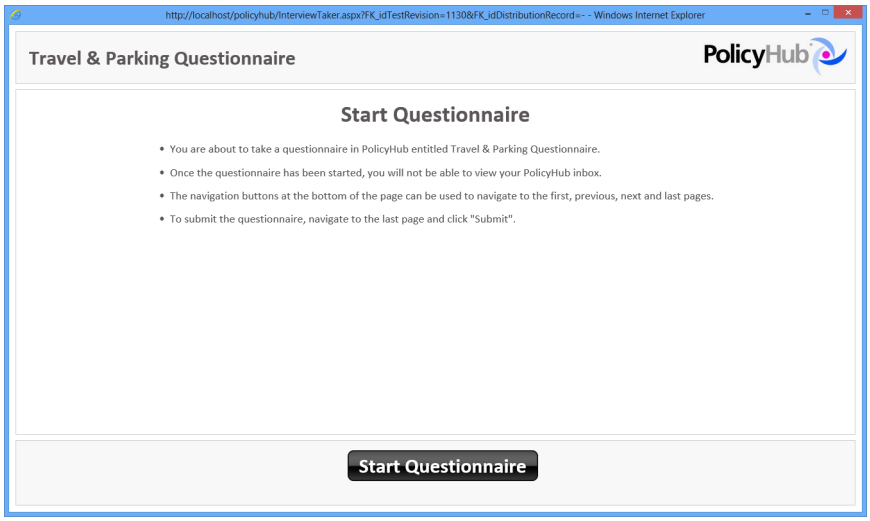
- Underground
- Bus
- Cycle
- Walk

6. The matrix question *How often do you use the following modes of transport when commuting to work?* now has six child questions.
7. Select *Options* (below *Walk*). Change the *Question type* (in the properties on the right) to *Rating scale*. Select *Never to Frequently* from the *Rating templates* dialog. Click *Select*.
8. Save the Questionnaire.

3.1.7. Previewing The Questionnaire

The Questionnaire can be previewed to ensure it has been created correctly.

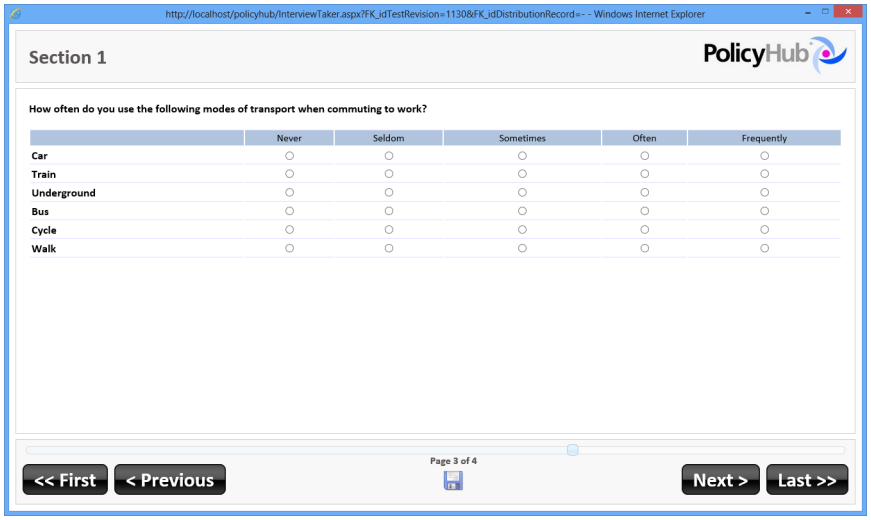
1. Click the *Save & preview* button to open the Questionnaire.
2. The Start page is displayed.



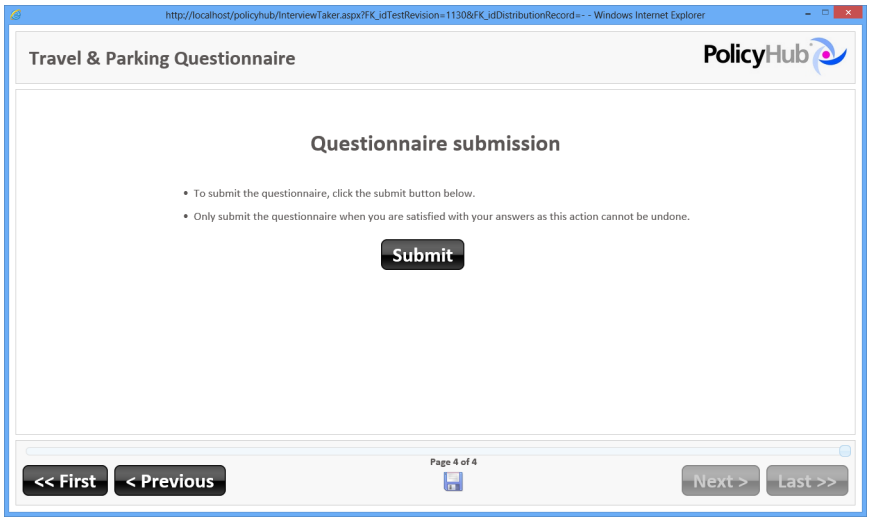
3. Click *Start Questionnaire* to view the questions. The first question is the selection question.

4. Click *Next* to view the rating scale question.

5. Click *Next* to view the matrix question.



6. Click *Next* to see the submission page.



7. To close the Questionnaire preview window, either close the web browser window or click *Submit*. You are then asked to confirm you want to submit the questionnaire. Click *Yes*. Then click *Close* to close the Questionnaire preview window.

Note: When *previewing* a Questionnaire, clicking *Submit* does *not* submit the Questionnaire. It just shows the Questionnaire creator the same screens as the recipients will see when this Questionnaire is sent to them and they start the Questionnaire.

3.2. Creating A Branching Question

This example shows how to create a simple Questionnaire with three questions. The first question asks whether the respondent drives to work. If they do not, they omit the next question about car parking and go straight to the question in the second section about how long they have worked at the company. However, if they *do* drive to work, they are taken to the question about car parking and then on to the second section.

1. Create a new Questionnaire. Give it a title, name, description and revision description.
2. Create two sections.
3. Ensure *Questions per page* is set to *Other* and *1*.

Note: Branching can be configured for Questionnaires with the setting *Questions per page* set to *1* only. When *Questions per page* is set to *2* or more (or *All*), the *Branch to* option is not available.

4. In *Section 1*, create the selection question *Do you ever drive to work?*
5. Create two selection options:

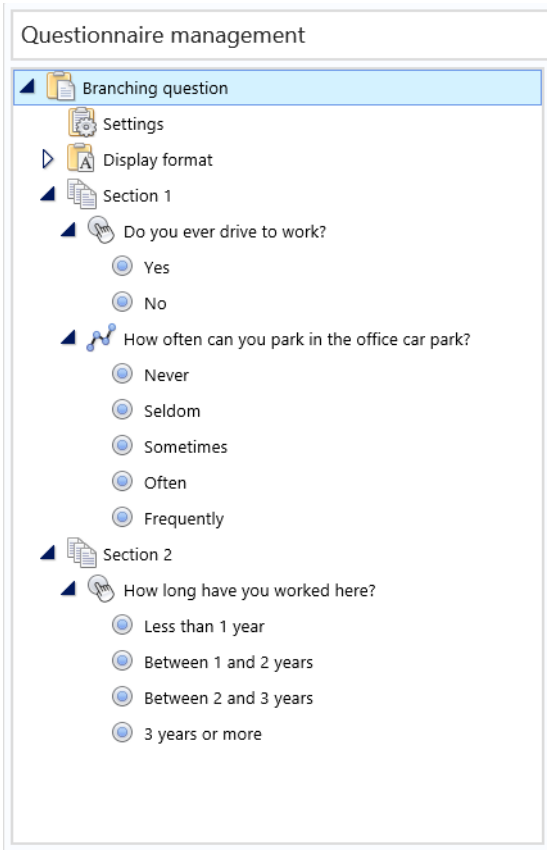
- Yes
- No

6. Select *Section 1* and add a rating question and select *Never to Frequently* from the *Rating scale* templates.
7. Edit *Question 2* to ask *How often can you park in the office car park?*

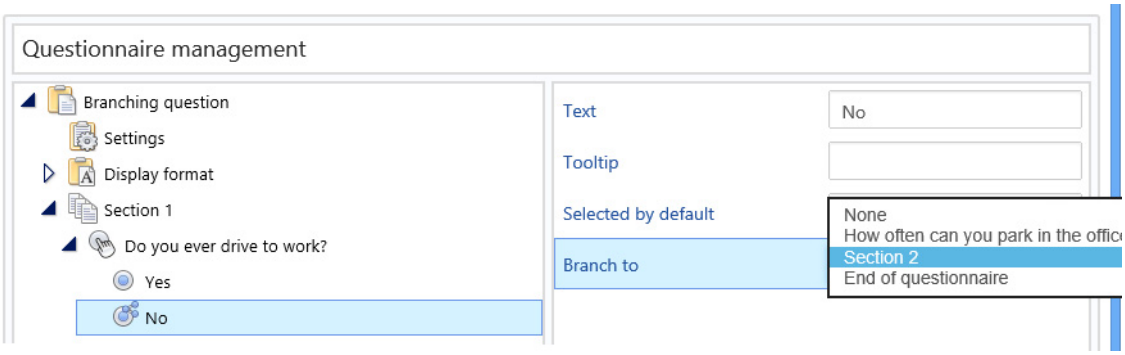
8. Select *Section 2* and add a selection question.
9. Edit *Question 1* (in *Section 2*) to ask *How long have you worked here?*
10. Add four selection options and change them to:

- Less than 1 year
- Between 1 and 2 years
- Between 2 and 3 years
- 3 years or more

11. Save the Questionnaire. The Questionnaire now has two sections and three questions.



12. Select the question *Do you ever drive to work?* then select the answer option *No.* In the properties pane on the right, click on the *Branch to* drop-down list and select *Section 2*.



3.2.1. Preview The Questionnaire

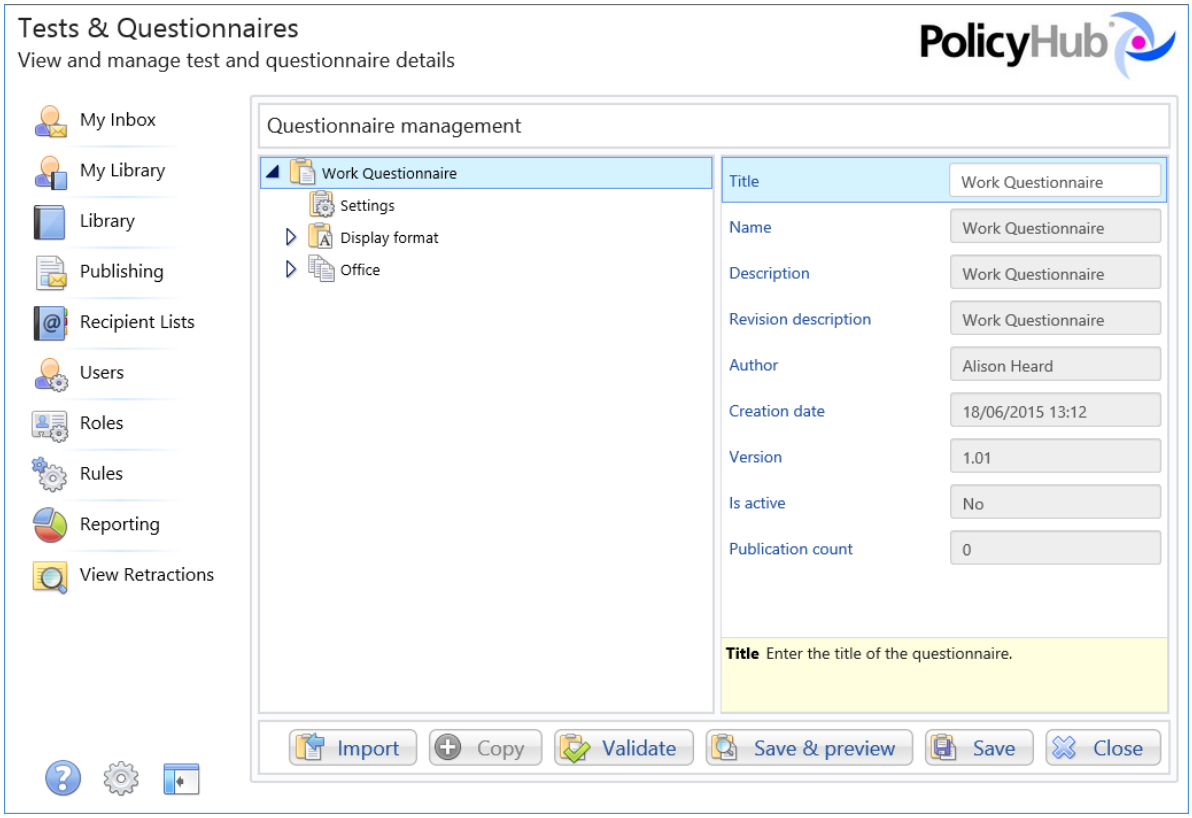
You can verify the branching is correct by previewing the Questionnaire.

1. Click *Save & preview* and, for the first question, *Do you ever drive to work?* select *Yes* and click *Next.*
2. You are taken to the next question *How often can you park in the office car park?*
3. Select an answer and click *Next*. You are taken to the question in Section 2 *How long have you worked here?*
4. Now, click *First* to go through the Questionnaire again. This time, for the first question *Do you every drive to work?* select *No* and click *Next*.
5. You are taken straight to the question in *Section 2*, omitting the question about the car park.
6. Close the Questionnaire preview window and return to PolicyHub.

3.3. Importing Sections From Other Questionnaires

A Questionnaire can be based partially or completely on questions and sections from other Questionnaires. This example shows how to edit a Questionnaire and import into it a whole section from another Questionnaire.

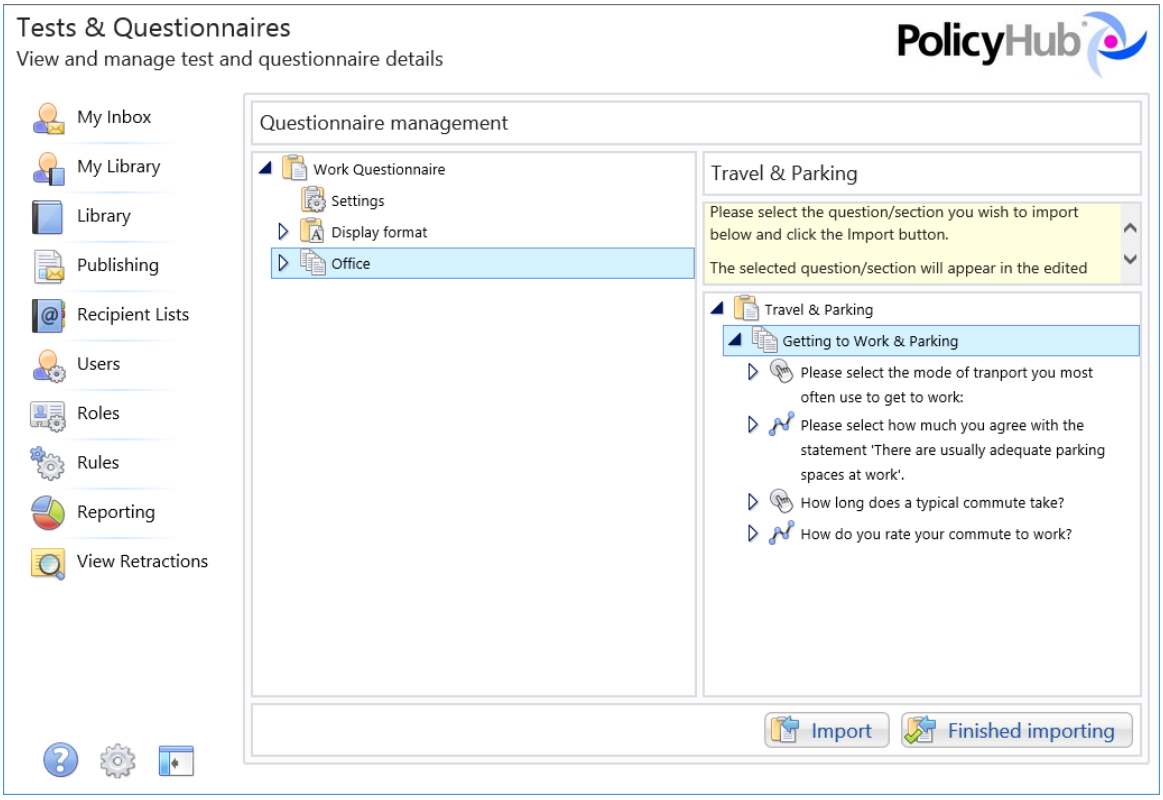
1. From the library, select the Questionnaire you want to edit, right-click and select *Edit latest revision* from the menu.
2. An imported Questionnaire section will appear at the end of the Questionnaire. Therefore, create any sections you require so the imported section appears in the required order in the Questionnaire. In this example, a section called *Office* has been created. The imported section will appear next. More sections can then be added to the Questionnaire as required.



3. Select the section *Office* and click *Import*.

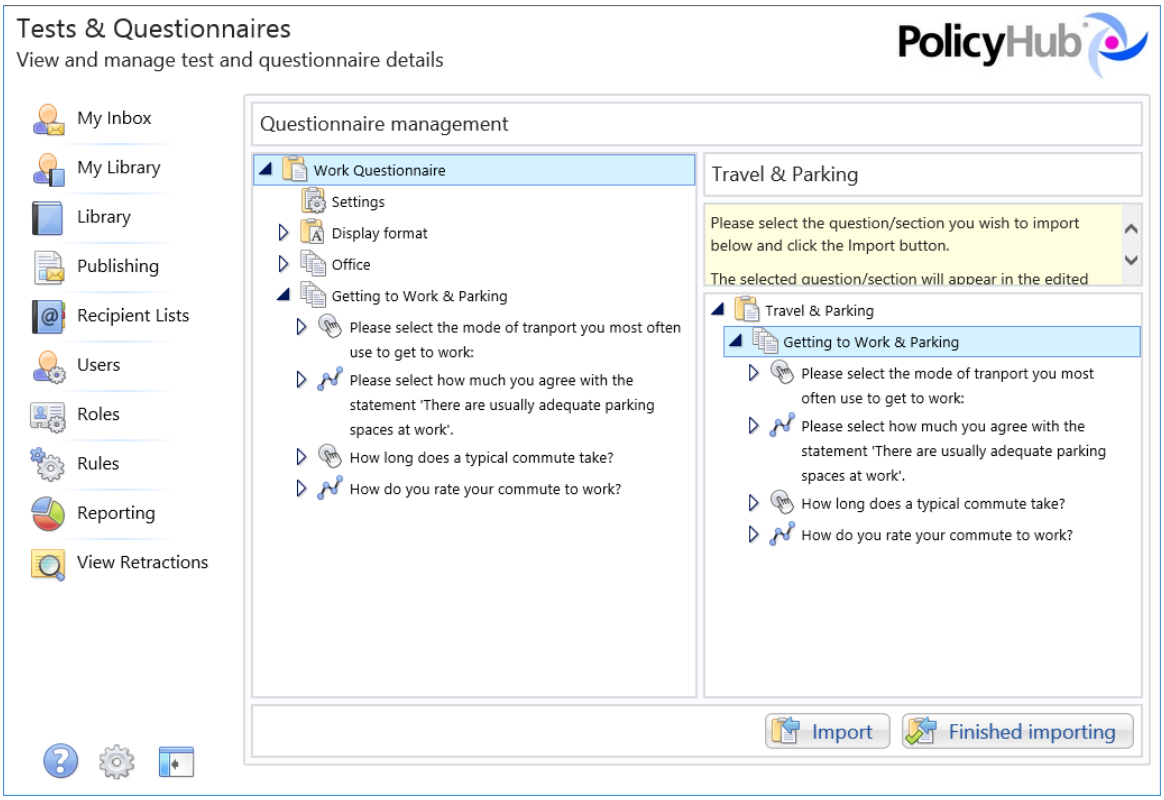
Note: To import a section into a new Questionnaire which does not yet contain any sections, select the Questionnaire title and click *Import*.

4. The library is opened. Browse to the folder containing the Questionnaire you want to import. Select the Questionnaire and click *Select*. The latest revision of the Questionnaire is opened. The Questionnaire you are editing is displayed in the panel on the left and the Questionnaire you are going to import is shown in the panel on the right.



5. From the panel on the right, select the section you want to import and then click the *Import* button. In this example, there is only one section, *Getting to Work & Parking*. (To import multiple sections, use the *Ctrl* key while selecting the sections and then click *Import*.)

6. The selected section is added to the Questionnaire being edited.



Note: If you select a section for import which contains a question which branches to another question or to a section, the question will be imported *without* branching. Branching can be added to the question when you have finished importing questions. See "Creating A Branching Question" on page 31 for an example. An imported question which branches to the end of the Questionnaire retains the branching settings.

7. If required, continue adding more sections from the Questionnaire on the right. Click *Finished importing* to close the Questionnaire panel on the right.
8. Using the examples in this chapter, complete the Questionnaire.

3.4. Importing Questions From Other Questionnaires

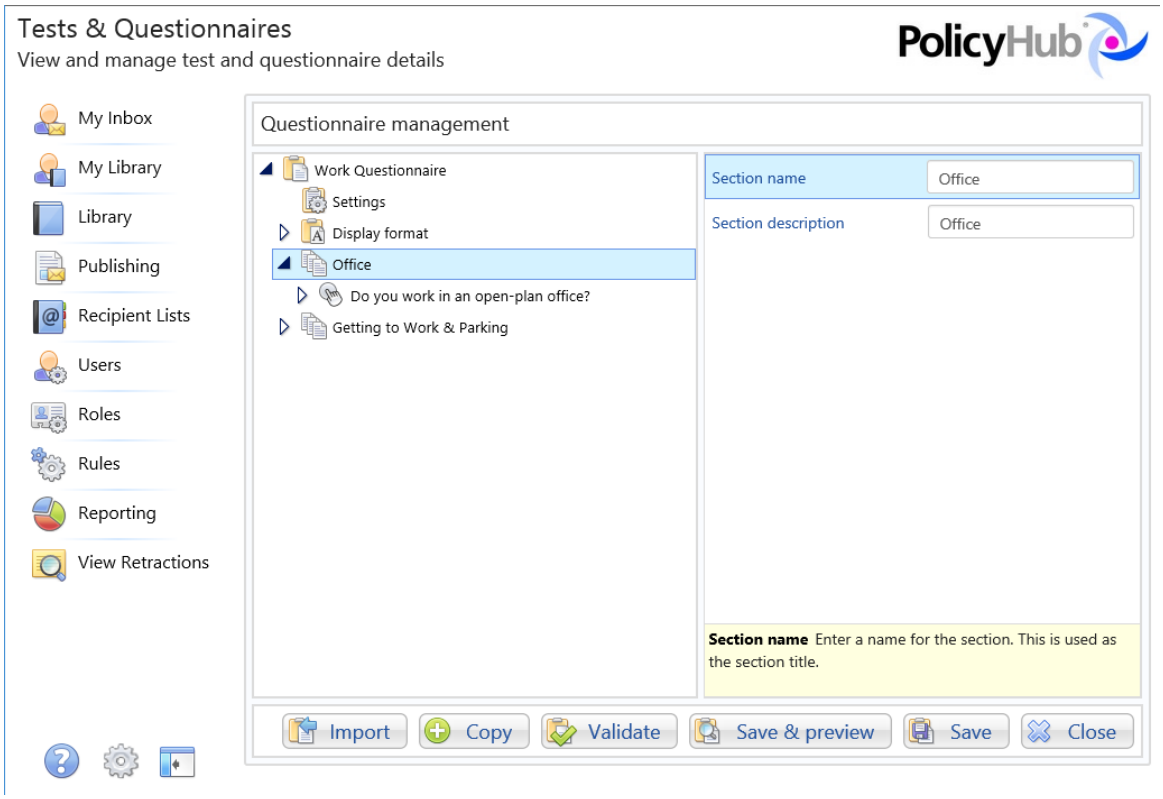
This example shows how to edit a Questionnaire and import into it a question from another Questionnaire.

1. From the library, select the Questionnaire you want to edit, right-click and select *Edit latest revision* from the menu.
2. Select the section you want to import the question into and click *Import*.

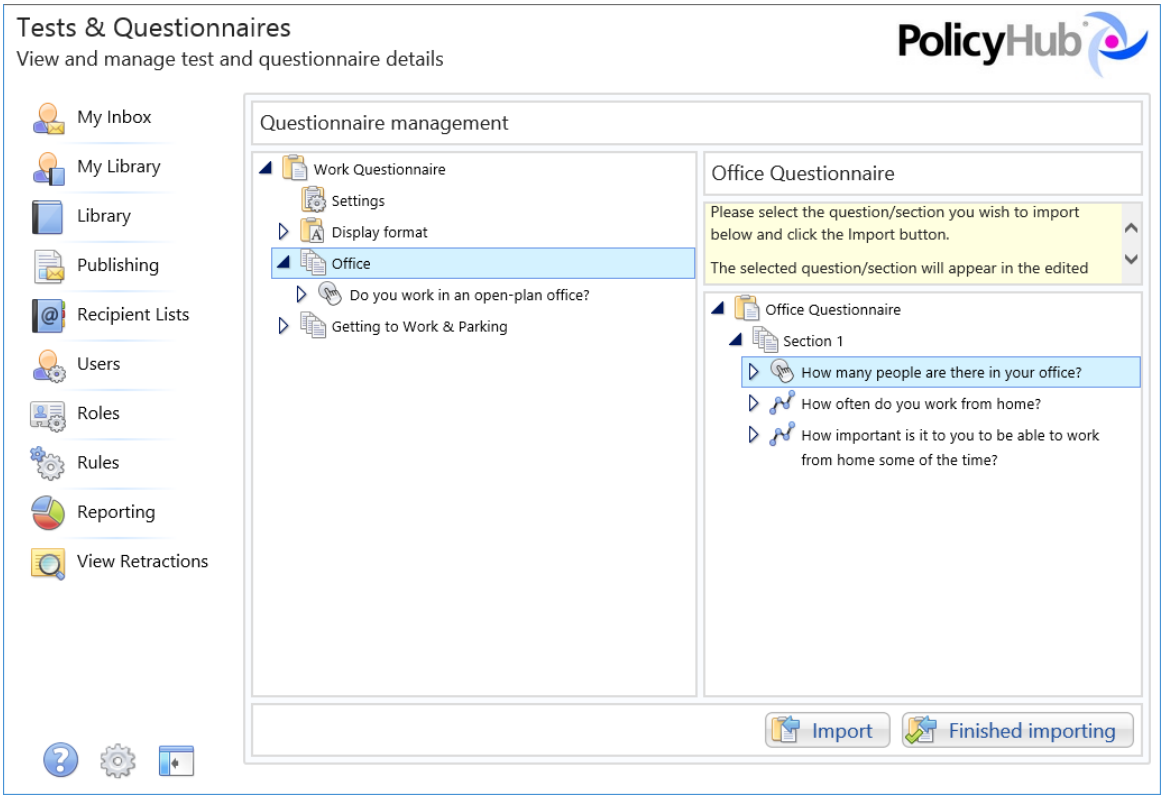
Note: You must select the section you want a question to be imported into. If this is a new Questionnaire, first create a section, then select the section and click *Import*.

3. The library is opened. Browse to the folder containing the Questionnaire you want to import. Select the Questionnaire and click *Select*. The latest revision of the Questionnaire is opened. The Questionnaire you are editing is displayed in the panel on the left and the Questionnaire you are going to import is shown in the panel on the right.

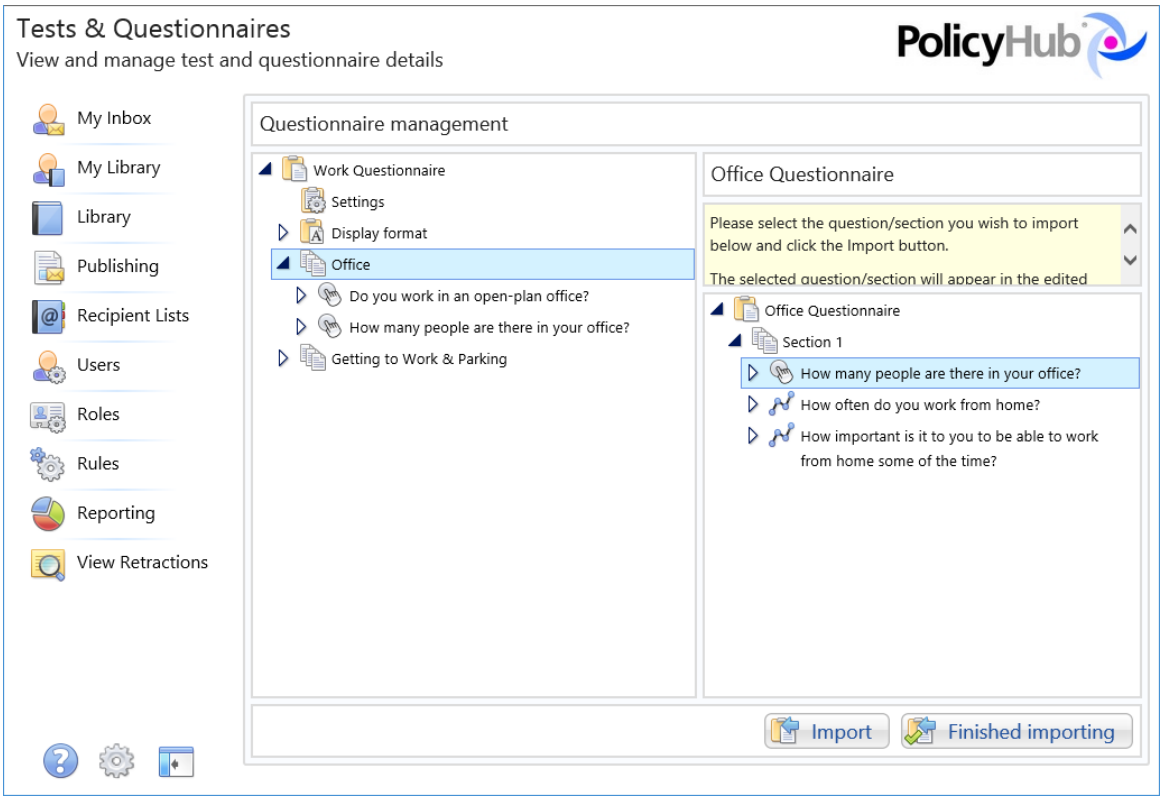
4. An imported Questionnaire question will appear at the end of the selected section. Therefore, create any questions you require so the imported question appears in the required order in the section. In this example, a section called *Office* has been created. The imported question will appear as the second question in this section. More questions can then be added to the Questionnaire as required.



5. From the panel on the right, select the question you want to import and then click the *Import* button. (To import multiple questions, use the *Ctrl* key while selecting the questions and then click *Import*.)



6. The selected question is added to the Questionnaire being edited.



Note: If you select a question for import which branches to another question or to a section, the question will be imported *without* branching. Branching can be added to the question when you have finished importing questions. See "Creating A Branching Question" on page 31 for an example. An imported question which branches to the end of the Questionnaire retains the branching settings.

7. If required, continue adding more questions from the Questionnaire on the right. Click *Finished importing* to close the Questionnaire panel on the right.
8. Using the examples in this chapter, complete the Questionnaire.

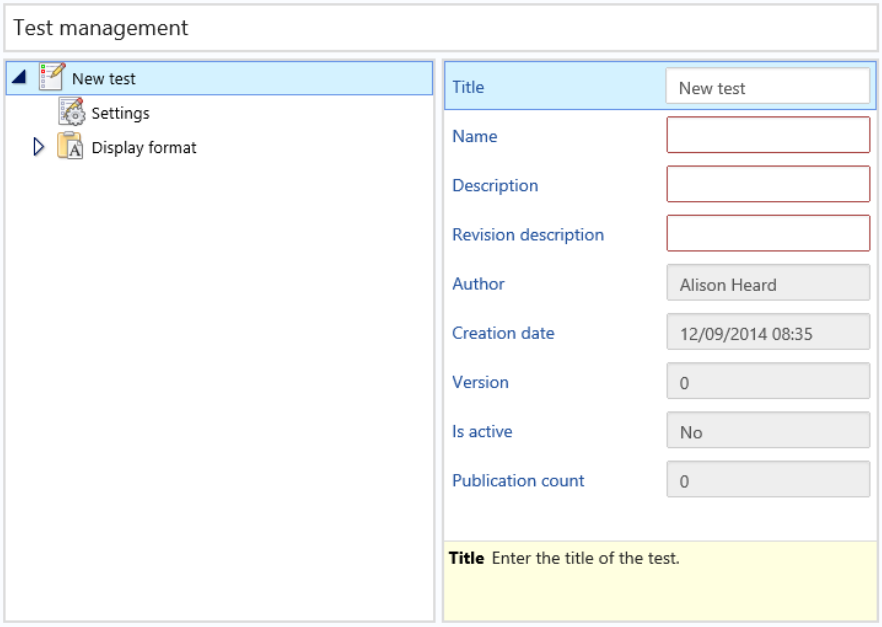
4. Test Configuration Examples

4.1. Create A Simple Test With Selection Answers

This Test has two sections. The first section has two questions, the second section has one question. All the questions include a list of possible answers. The Test taker must choose one answer for each question. At the end of the Test, the Test taker will see their marked answers.

4.1.1. Configure The Test Properties

1. Select the folder in which you want to store the Test, right-click on it and select *Create test* from the menu.

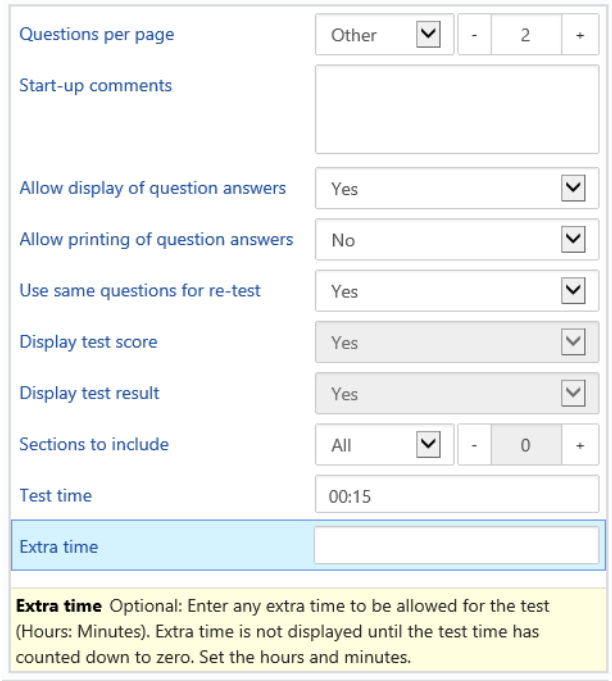


2. Enter a *Title* for the Test. The title appears at the top of the Test. The default title is *New test*. In this example, change it to *Annual Leave Test.*
3. Enter a name for the Test. In this example, *Annual Leave Test*.
4. Enter a *Name* for the Test. This is the name the Test will be saved as in the library. In this example, enter *Annual Leave Test*.
5. Enter a *Description* in the text box. In this example, enter *Tests knowledge of Annual Leave Policy.*
6. Enter a *Revision description*. In this example, enter *Annual Leave Test for the Annual Leave Policy.*

4.1.2. Settings

1. This Test will have the questions from *Section 1* on one page and the questions from *Section 2* on a second page. To configure this, select *Settings* and set the value for *Questions per page* equal to *2*. This ensures all the questions from *Section 1* are on one page, and all the questions from *Section 2* are on another. In this example, set *Questions per page* to 2.
2. In this example, the respondents will not see a *Test certificate* but they will be able to see their marked answers after they have submitted the Test. Set *Allow display of question answers* to *Yes*.

3. In this example, the respondents will not be allowed to print their answers so set *Allow printing of question answers* to *No*.
4. When this Test is sent with a rule which has retries set, if the User fails the Test the first time, they will be sent the Test again so they can take the Test again. In this example, if this happens, the respondents will get the same questions as they did for the initial Test. Set *Use same questions for re-test Yes*.
5. The options *Display test score* and *Display test result* are set to *Yes* and cannot be changed because *Allow display of question answers* was set to *Yes*.
6. This Test will contain two sections and both sections will be included in the Test so set *Sections to include* to *All*.
7. Click in the *Test time* box and move the minute slider to 15 minutes (leave the hour slider at *0*). When you click away from the *Test time* field 00:15 is displayed.
8. No extra time is required so do not configure any *Extra time*.



9. Click *Save* to save the Test.

Note: If any required fields are left blank, errors are displayed when you try to save the Test. These errors must be fixed before you can save the Test. Validation errors will not prevent the Test from being saved. However, validation errors must be fixed before the Test can be Published. See "Validate" on page 234 for more information.

4.1.3. Create Section 1 And Questions

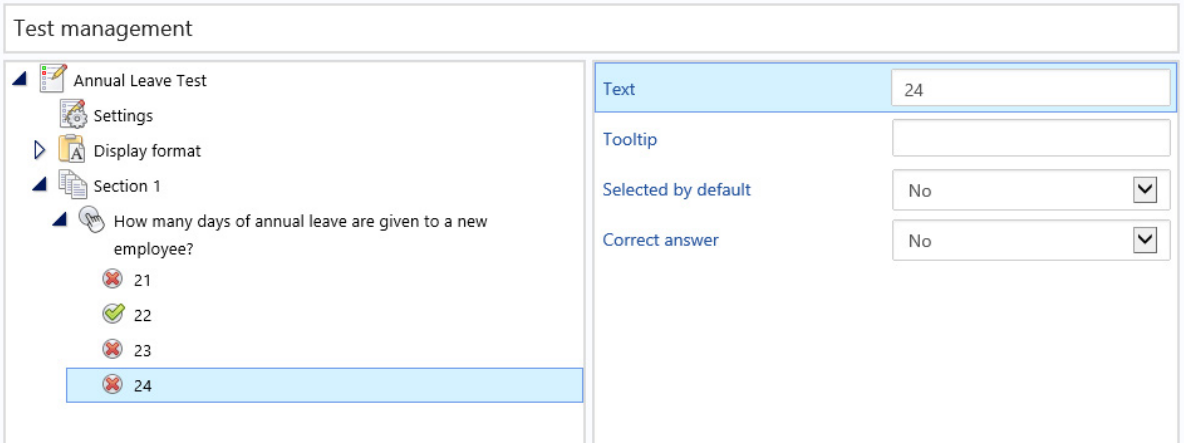
1. Right-click on *Annual Leave Test* and select *Add a section* from the menu. *Section 1* is added to the Test.
2. Right-click on *Section 1* and select *Add a selection question* from the menu. *Question 1* is displayed below *Section 1* in the Test explorer.
3. Double-click *Question 1* and replace it with the required question. In this example, *How many days of annual leave are given to a new employee?*

4. Click *Save* to save the Test.

4.1.4. Create The Answer Options

The Selection type answer needs a number of options the Test taker can choose from.

1. Right-click on *How many days of annual leave are given to a new employee?* and select *Add selection option* from the menu. Repeat this until there are four options.
2. Double-click on *Option 1* and change it to *21*.
3. Double-click on *Option 2* and change it to *22*.
4. Double-click on *Option 3* and change it to *23*.
5. Double-click on *Option 4* and change it to *24*.
6. The correct answer for this question is 22, so right-click on the option 22 and select *Make this option the correct answer* from the menu.
7. The Test should now look like this.

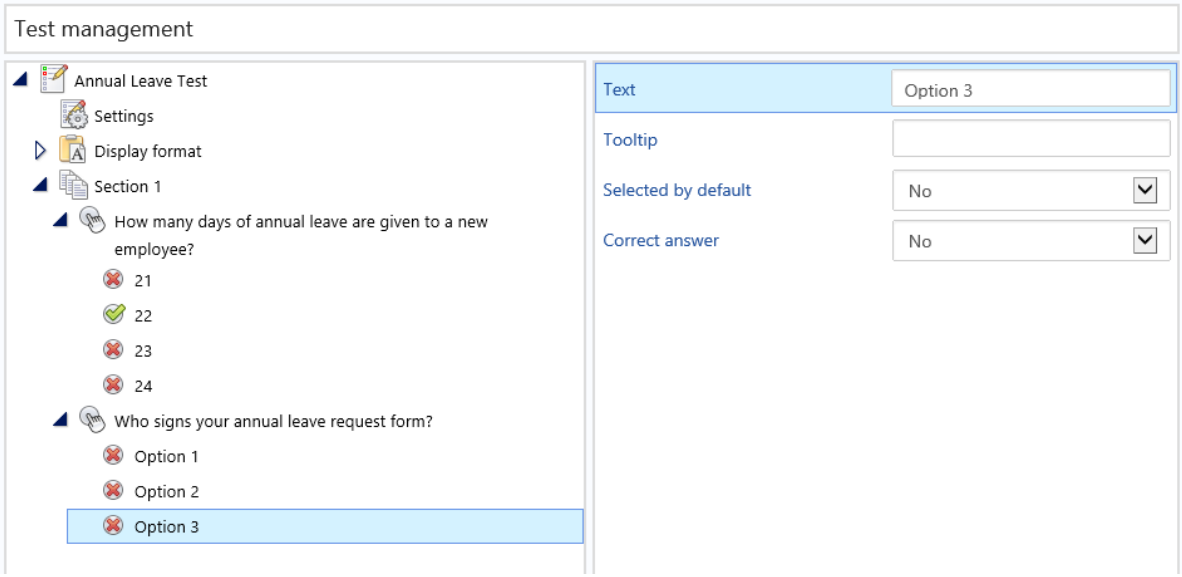


8. Save the Test.

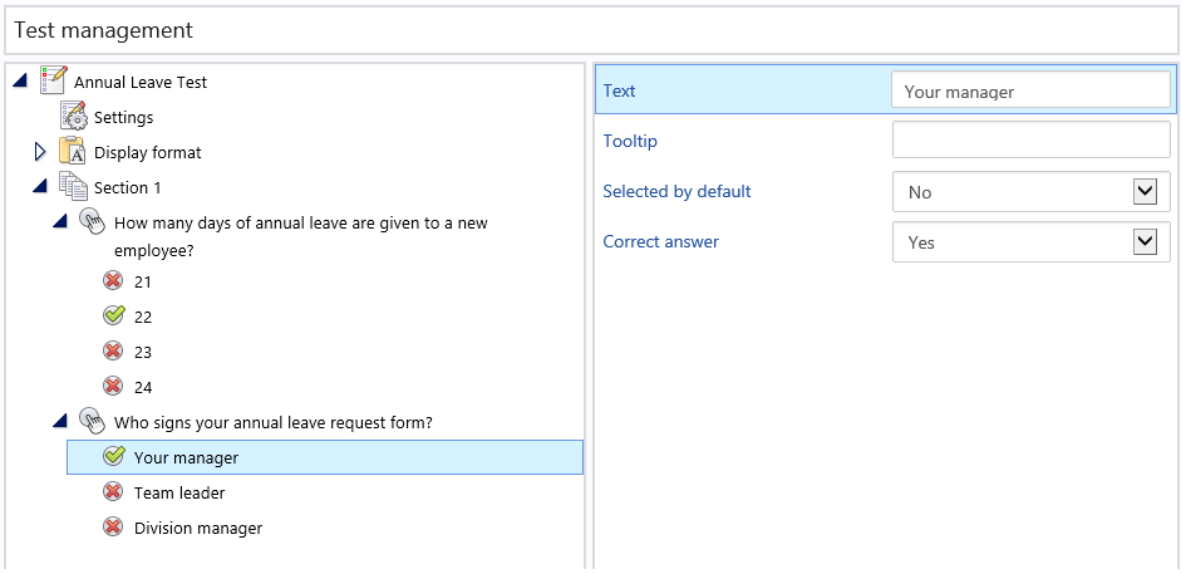
4.1.5. Adding Another Selection Question And Answers

1. To add more selection questions to *Section 1*, select *Section 1*, right-click and select *Add a selection question* from the menu.
2. *Question 2* appears below the question you have already created. Double-click on *Question 2* and replace it with *Who signs your annual leave request form?*

3. Right-click on *Who signs your annual leave request form?* and, from the menu, select *Add selection option*. Repeat so there are three options for this question.



4. Double-click *Option 1* and change it to *Your manager.*
5. Double-click *Option 2* and change it to *Team leader.*
6. Double-click *Option 3* and change it to *Division manager.*
7. The correct answer is *Your manager* so right-click on *Your manager* and select *Make this option the correct answer* from the menu.

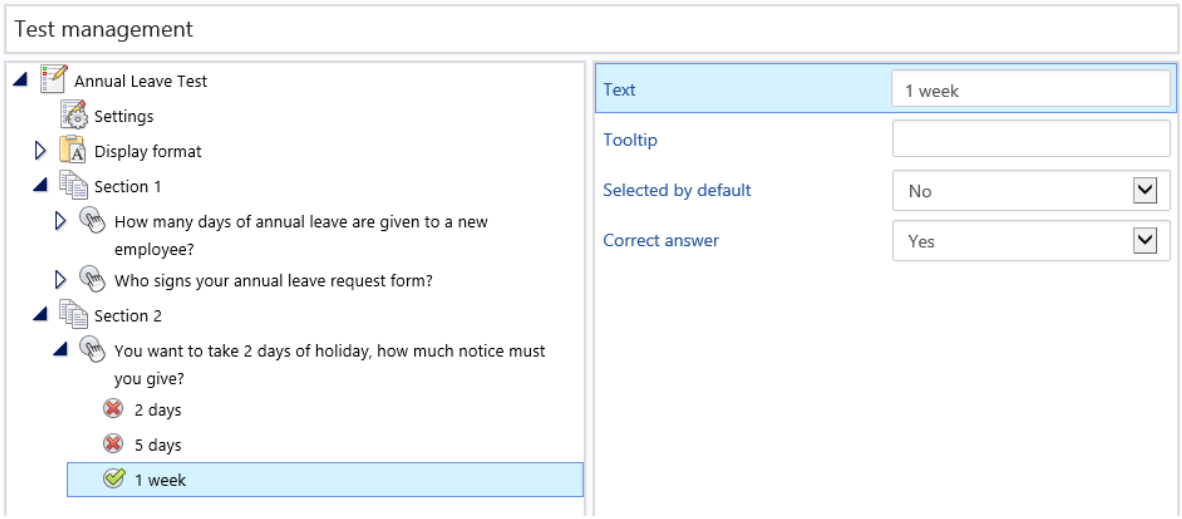


8. Save the Test.

4.1.6. Creating Section 2

1. Select *Annual Leave Test*, right-click and select *Add a new section* from the menu. *Section 2* appears below everything else you have configured so far.
2. Right-click on *Section 2* and select *Add a selection question* from the menu.
3. Select *Question 1* and change the *Question text* to *You want to take 2 days of holiday, how much notice must you give?*

4. Right-click on the question *You want to take 2 days of holiday, how much notice must you give?* and select *Add selection option* from the menu. Repeat so this question has three options.
5. Double-click *Option 1* and change it to *2 days*.
6. Double-click *Option 2* and change it to *5 days*.
7. Double-click *Option 3* and change it to *1 week.*
8. The correct answer is *1 week* so right-click on *1 week* and select *Make this option the correct answer* from the menu.



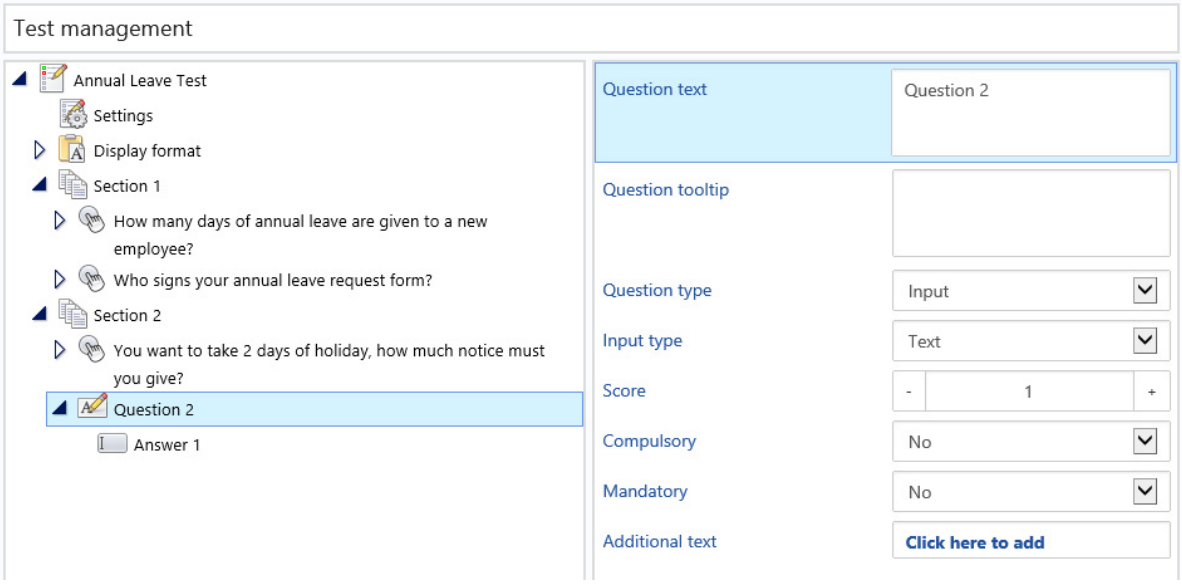
9. Save the Test.

4.2. Create Input Questions

In this example, create a question which requires the respondent to enter a date.

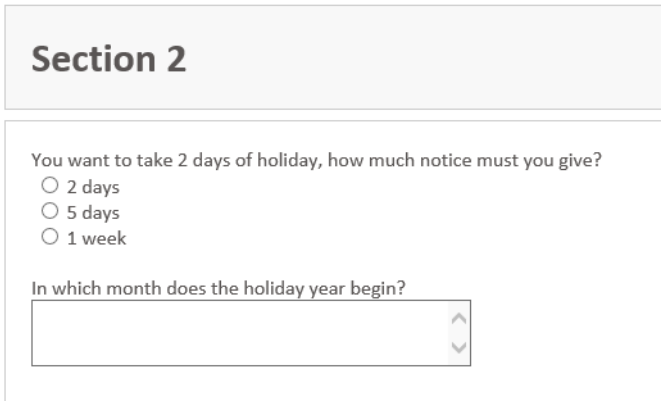
Select the *Annual Leave Test* in the library, right-click on it and select *Edit latest revision* from the menu.

1. Right-click on *Section 2* and select *Add an input question* from the menu. An input question is added below the selection question in *Section 2*.



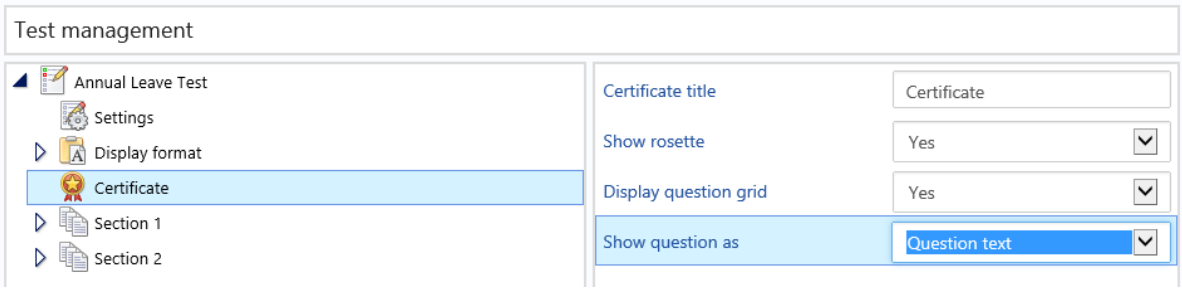
2. The input question is, by default, a text question.

3. Double-click on *Question 2* and change it to *In which month does the holiday year begin?*
4. Double-click on *Answer 1* and change it to *January*.
5. When the respondents takes the Test, they must type the answer in the text box.



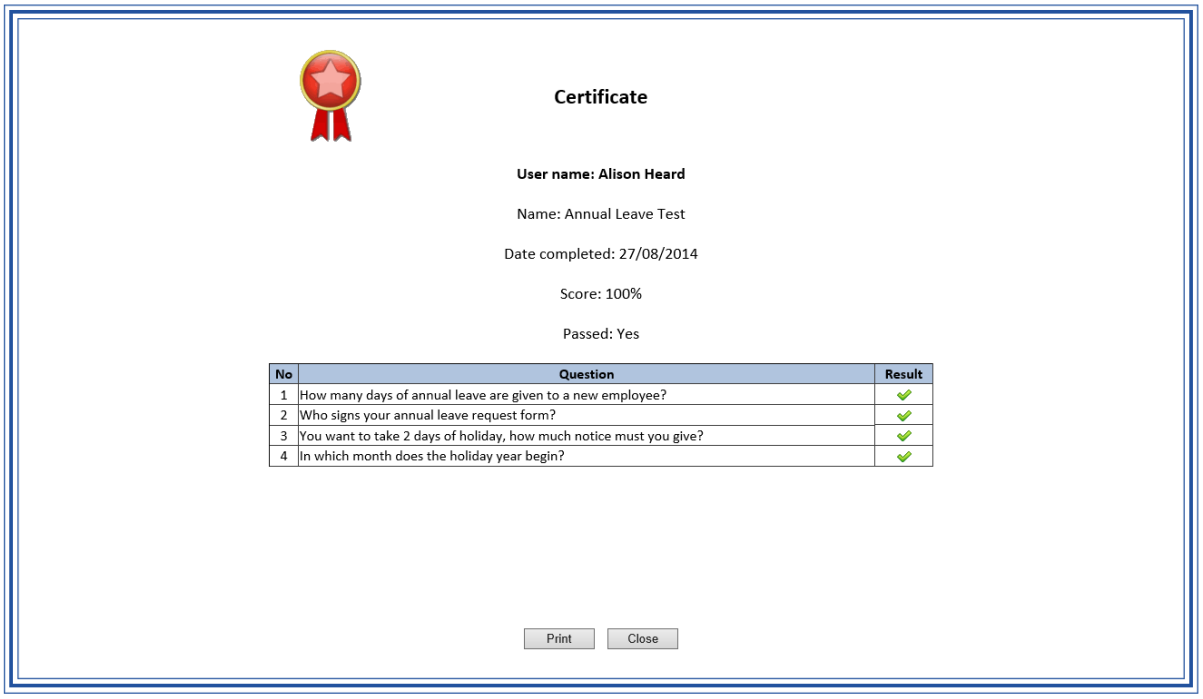
4.3. Configure A Test Certificate

1. Edit the Test for which you want to configure a Test certificate.
2. Right-click on the *Test title*, and select *Add test certificate* from the menu. *Test Confirmation* is added to the Test explorer. Select *Test Confirmation* in the Test explorer.
3. Edit the *Certificate titl*e, as required. The title is displayed at the top of the Test certificate. In this example, change it to *Certificate*.
4. By default, *Show rosette* is set to *Yes* which adds a rosette to the certificate. (If you do not want a rosette on the certificate, set *Show rosette* to *No*.)
5. By default *Display question grid* is set to *Yes*. This adds a grid displaying either the Test question test or the tooltips. In this example, leave this set to *Yes*.
6. The option *Show question as* determines whether the questions or the tooltips are displayed in the question grid. In this example, select *Question text*.



7. Save the Test.

8. When the Test is published and a recipient completes this Test, they can click the *View Test Certificate* button.



4.4. Create A Test Which Can Have Different Questions For Each User

A Test can be configured so that everyone gets the same questions, or it can be configured so that each recipient is presented with a random selection of questions from the Test.

Create a Test with all the questions in one section. The Test will vary more if there are lots of questions in the section but *Questions to include* is set to a low number. For example, having four questions in the section and having *Questions to include* set to *3* will mean that Tests will be very similar for each recipient. However, having 10 questions in the section with *Questions to include* set to *5* will ensure there is much more variety in the Tests.

4.4.1. Include Different Questions When Test Re-sent Due To Failure

To ensure the User gets different questions should they re-take the Test after failing it, set *Use same questions for re-test* to *No* in the *Test properties*.

4.4.2. Ensure A Question Is Always Included

Although you might want to have different questions for each recipient of the Test, you might want to ensure some questions appear in every Test. Right-click on the question you want included in every Test and select *Make question compulsory* from the menu.

Note: Ensure the number of compulsory questions in a section is lower than the number of *Questions to include* for that section as the more compulsory questions that are included, the fewer random questions can be included.

4.4.3. Random Sections

An alternative way to create Tests which contain different questions is to group related questions in different sections and then to set the *Sections to include* to a number which is less than the number of sections you have created. Each recipient will receive a Test with the number of sections specified.

Random sections can be configured with random questions.

4.4.3.1. Ensure A Section Is Always Included

When random sections are used, it is possible to right-click on a section and select *Make section compulsory* from the menu to ensure that sections is always included in the Test.

4.5. Score Answers Individually

Consider the Test question:

Which of the following are types of fruit?

1. Banana

2. Apple

3. Kangaroo

4. Train

There are 2 correct answers above, 1 and 2.

To prevent the respondent from scoring full marks by selecting every single answer, they are allowed to make the same number of selections as there are correct answers (2 in the above example).

When the respondent selects the second answer in the above question, the remaining answers are dimmed. The User can deselect one of the answers they have given in order to choose a different answer.

4.5.1. Score Answers Individually Set To No

When *Score answers individually* is set to *No*, if the respondent selects anything other than 1 *and* 2, they will get 0 points for the question.

If they select both 1 *and* 2, they will get all the points (Score) for the question.

4.5.2. Score Answers Individually Set To Yes

When set to *Yes*, the respondent can score partial points for partially correct answers.

To avoid having point scores which are not whole numbers, the *Score* for this question must be the number of correct answers or a multiple of the number of correct answers (in the above example: 2, 4, 6, 8 etc...).

If the respondent selects options 1 and 3 and the question had a *Score* of 2, they would get 1 point for the question.

If the respondent selects all of the correct answers they will, of course, get all the points for the question.

To prevent the respondent from scoring full marks by selecting every single answer, they will only be allowed to make the same number of selections as there are correct answers (2 in the above example).

When the respondent has selected the second answer in the above question, the remaining answers will be dimmed, although they will be able to deselect one of the answers they have given in order to choose a different answer.

4.5.3. Test Certificate

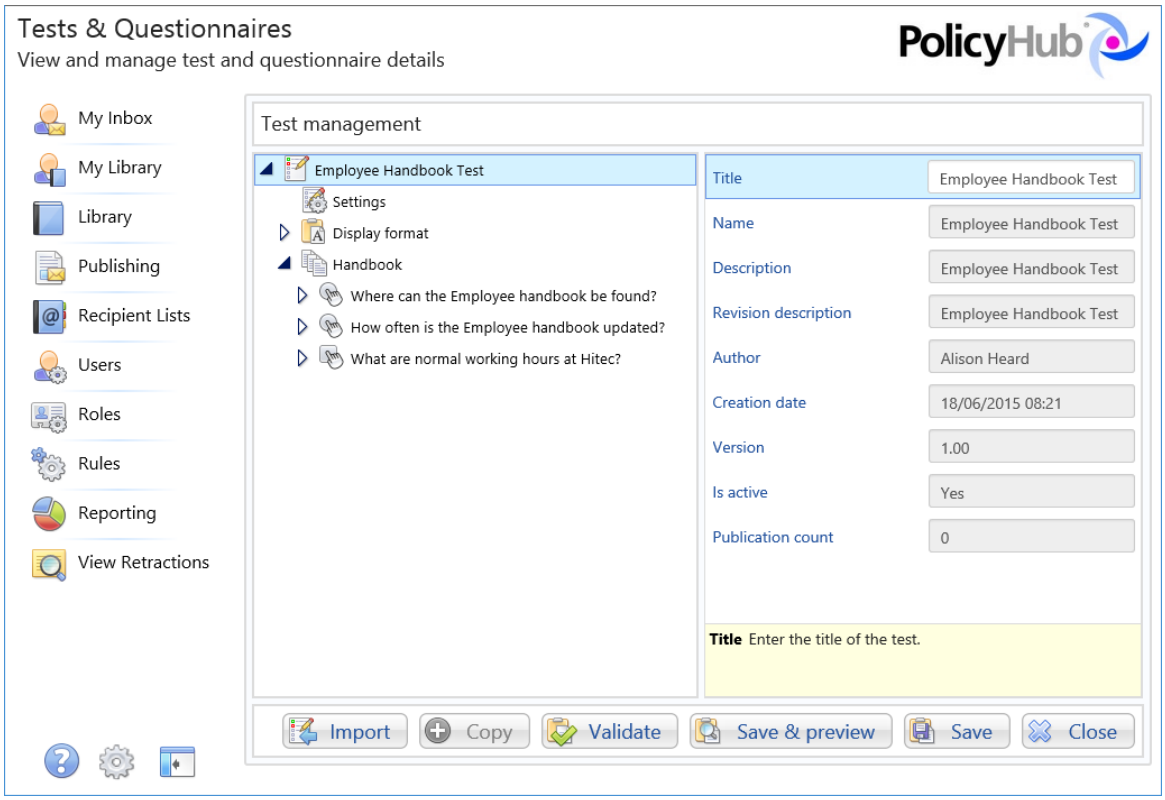
Setting *Score answers individually* to *Yes* also has an impact on the Test certificate and the question answers display that can be presented at the end of a Test. Instead of having just Green ticks (and Red crosses) for correct (and incorrect) answers, there is a third state, partially correct. This is represented by an Amber tick.

For the question answer display, incorrectly answered multiple choice questions are highlighted in red.

4.6. Importing Sections From Other Tests

A Test can be based partially or completely on questions and sections from other Tests. This example shows how to edit a Test and import into it a whole section from another Test.

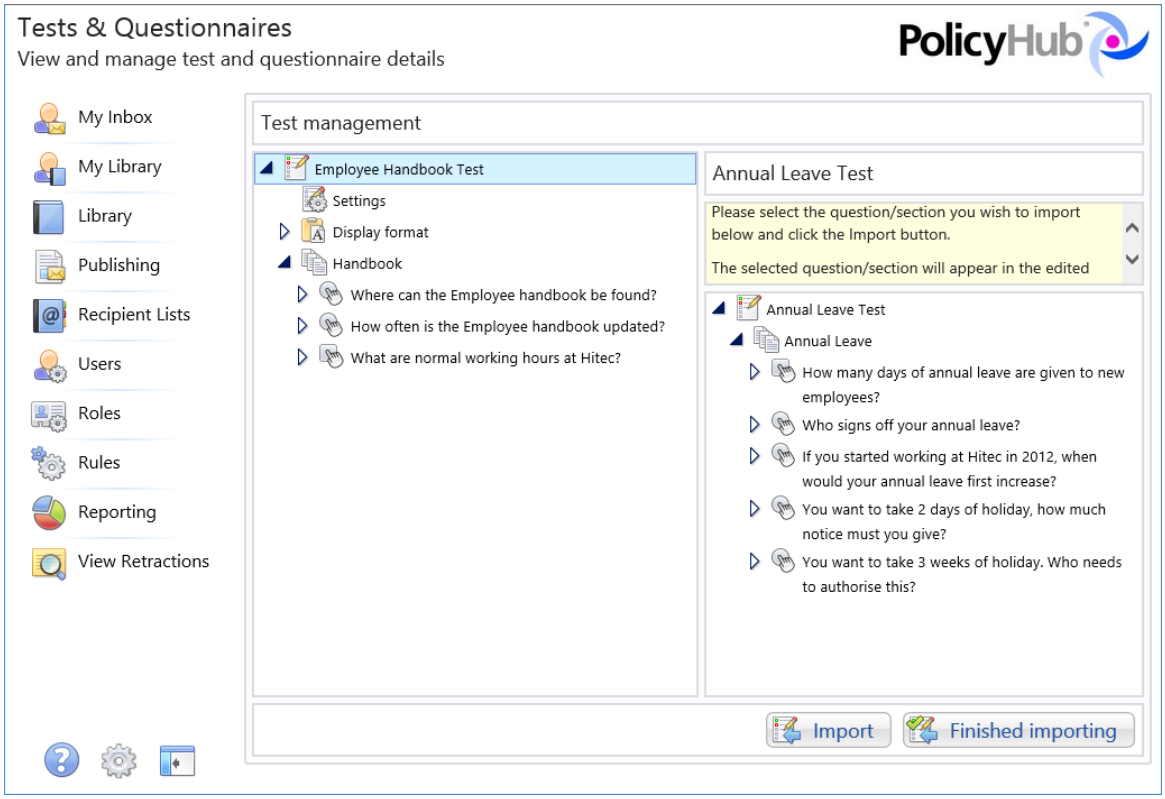
1. From the library, select the Test you want to edit, right-click and select *Edit latest revision* from the menu.
2. An imported Test section will appear at the end of the Test. Therefore, create any sections you require so the imported section appears in the required order in the Test. In this example, a section called *Handbook* has been created. The imported section will appear next. More sections can then be added to the Test as required.



3. Select the section *Handbook* and click *Import*.

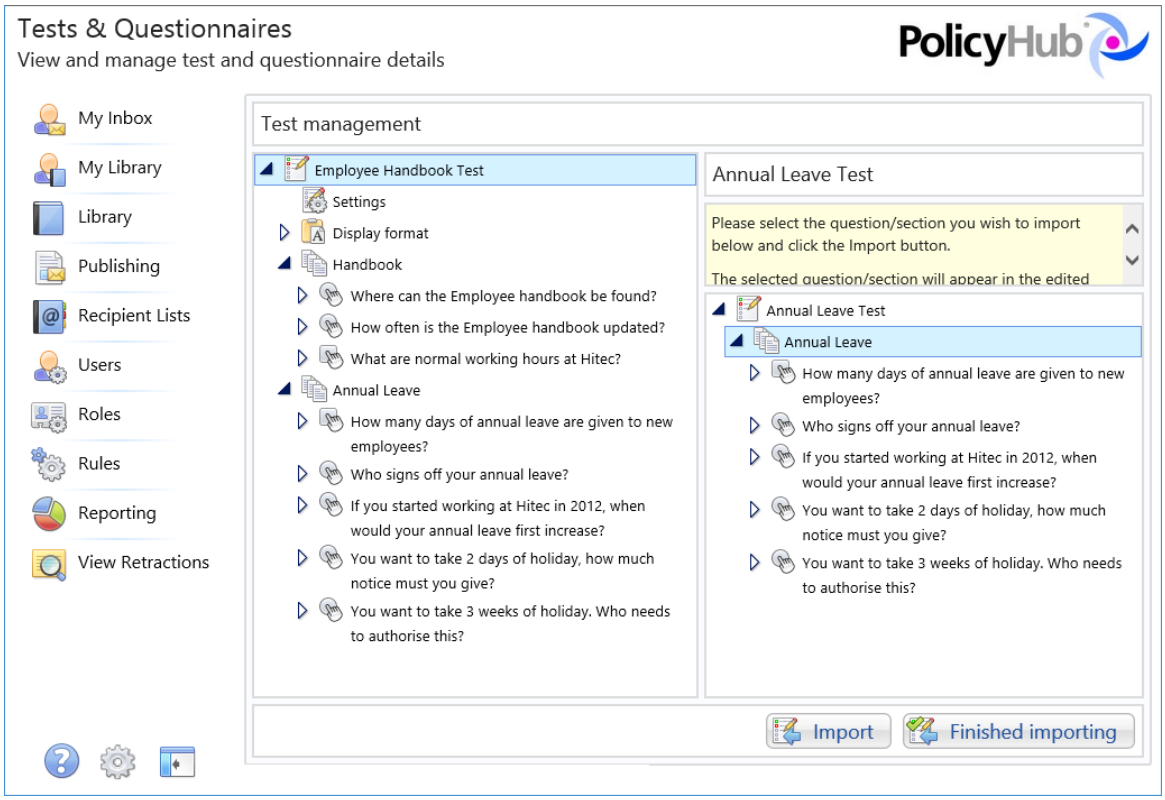
Note: To import a section into a new Test which does not yet contain any sections, select the Test title and click *Import*.

4. The library is opened. Browse to the folder containing the Test you want to import. Select the Test and click *Select*. The latest revision of the Test is opened. The Test you are editing is displayed in the panel on the left and the Test you are going to import is shown in the panel on the right.



5. From the panel on the right, select the section you want to import and then click the *Import* button. In this example, there is only one section, *Annual Leave.* (To import multiple sections, use the *Ctrl* key while selecting the sections and then click *Import*.)

6. The selected section is added to the Test being edited.



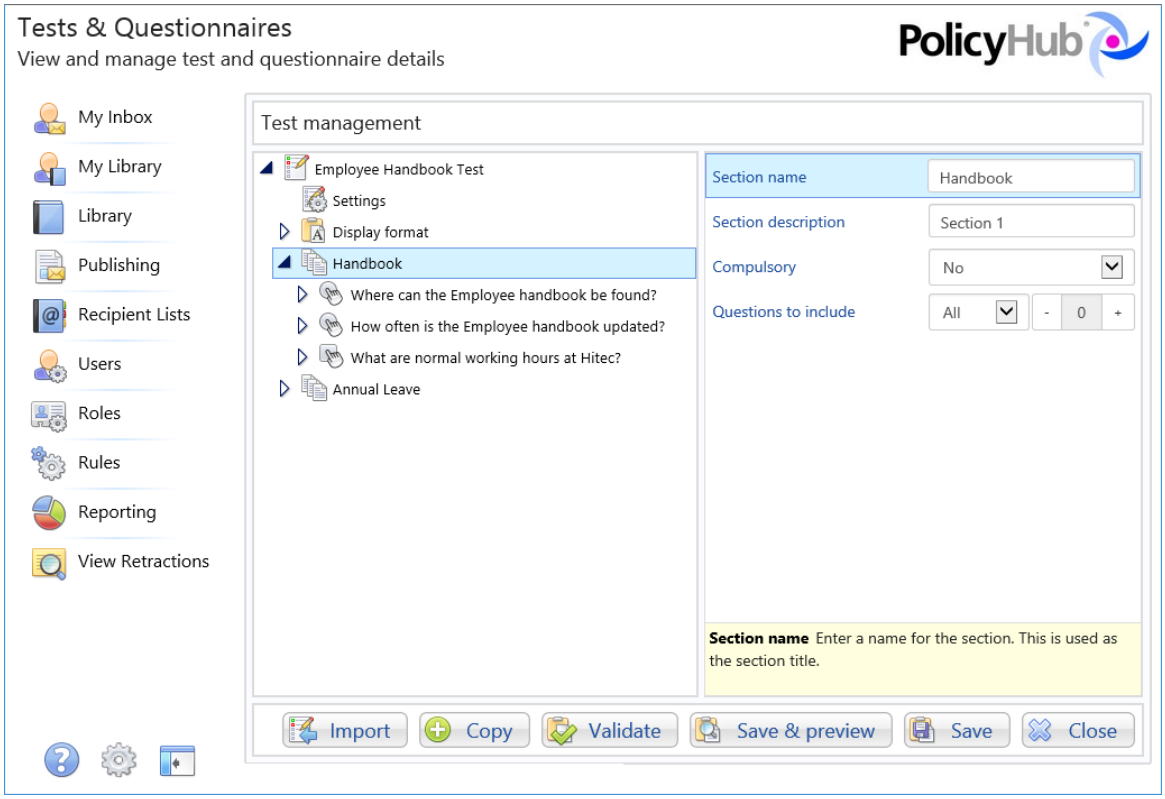
7. If required, continue adding more sections from the Test on the right. Click *Finished importing* to close the Test panel on the right.
8. Using the examples in this chapter, complete the Test.

4.7. Importing Questions From Other Tests

This example shows how to edit a Test and import into it a question from another Test.

1. From the library, select the Test you want to edit, right-click and select *Edit latest revision* from the menu.

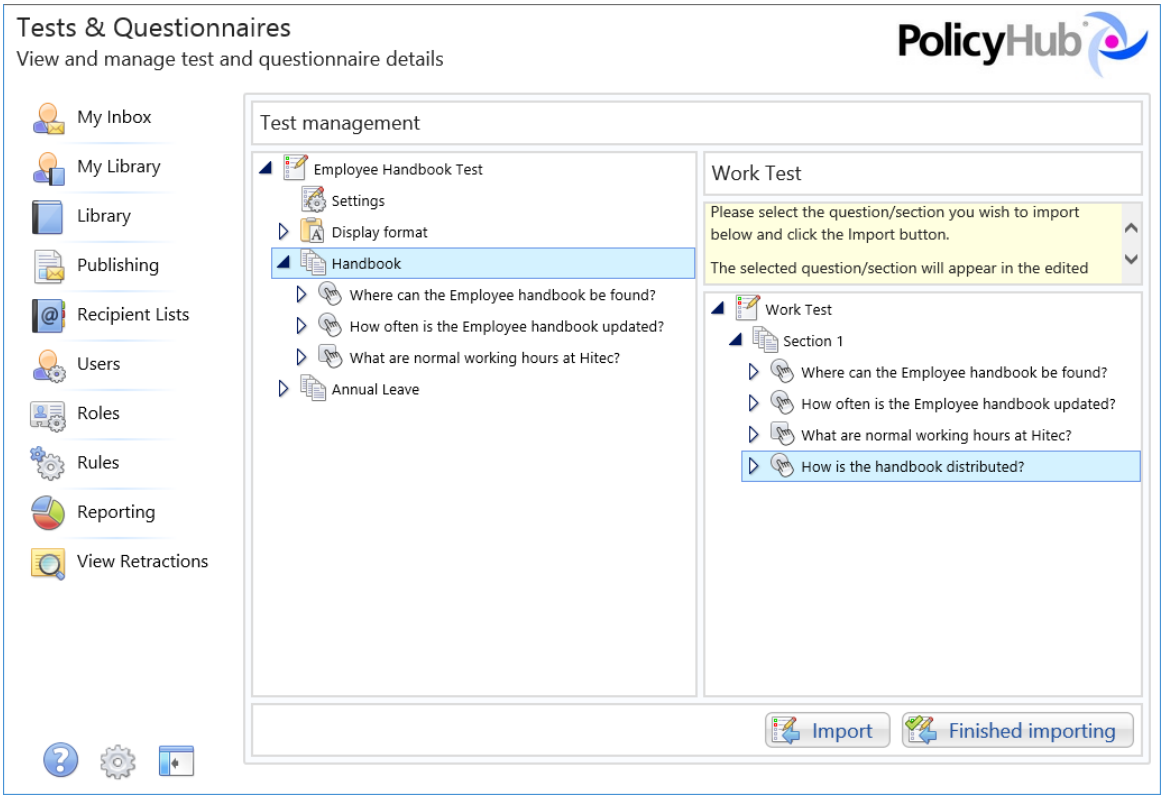
2. Select the section you want to import the question into and click *Import*. In this example, select *Handbook*.



Note: You must select the section you want a question to be imported into. If this is a new Test, first create a section, then select the section and click *Import*.

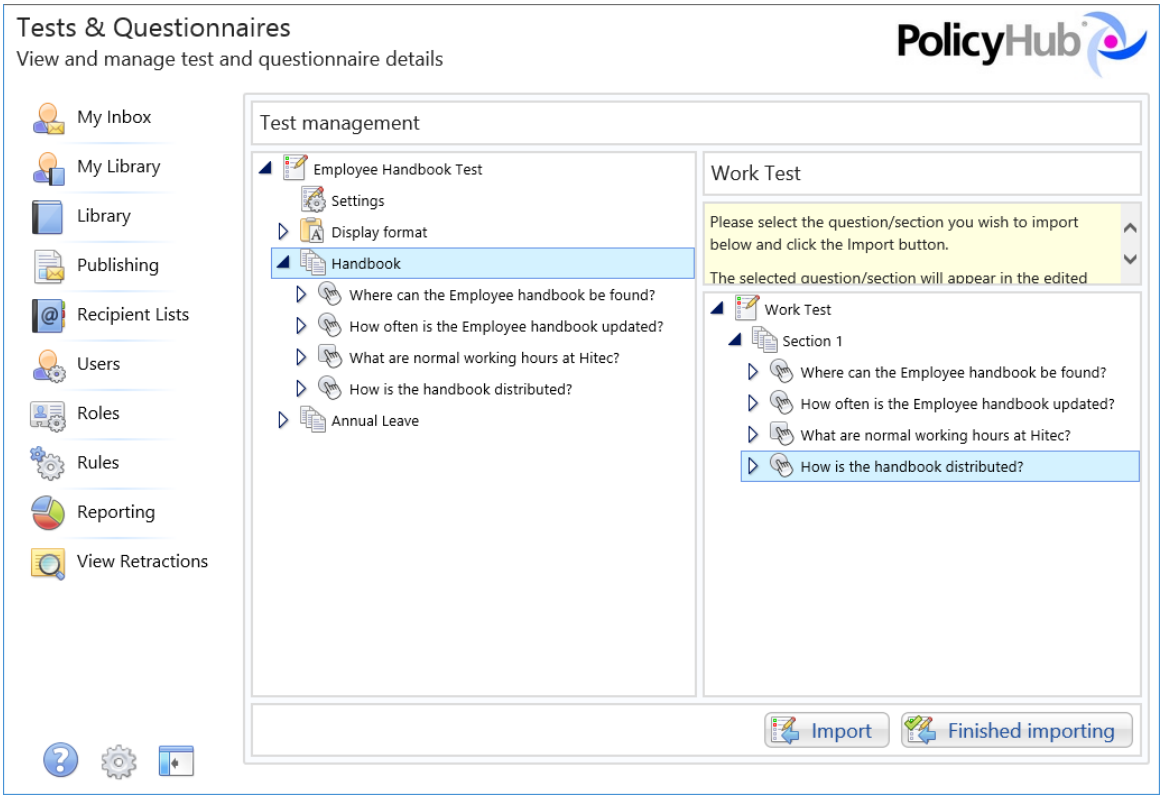
3. The library is opened. Browse to the folder containing the Test you want to import. Select the Test and click *Select*. The latest revision of the Test is opened. The Test you are editing

is displayed in the panel on the left and the Test you are going to import is shown in the panel on the right.



4. An imported Test question will appear at the end of the selected section. Therefore, create any questions you require so the imported question appears in the required order in the section. In this example, a section called *Handbook* has been created. The imported question will appear as the fourth question in this section. More questions can then be added to the Test as required.
5. From the panel on the right, select the question you want to import and then click the *Import* button. (To import multiple questions, use the *Ctrl* key while selecting the questions and then click *Import*.)

6. The selected question is added to the Test being edited.

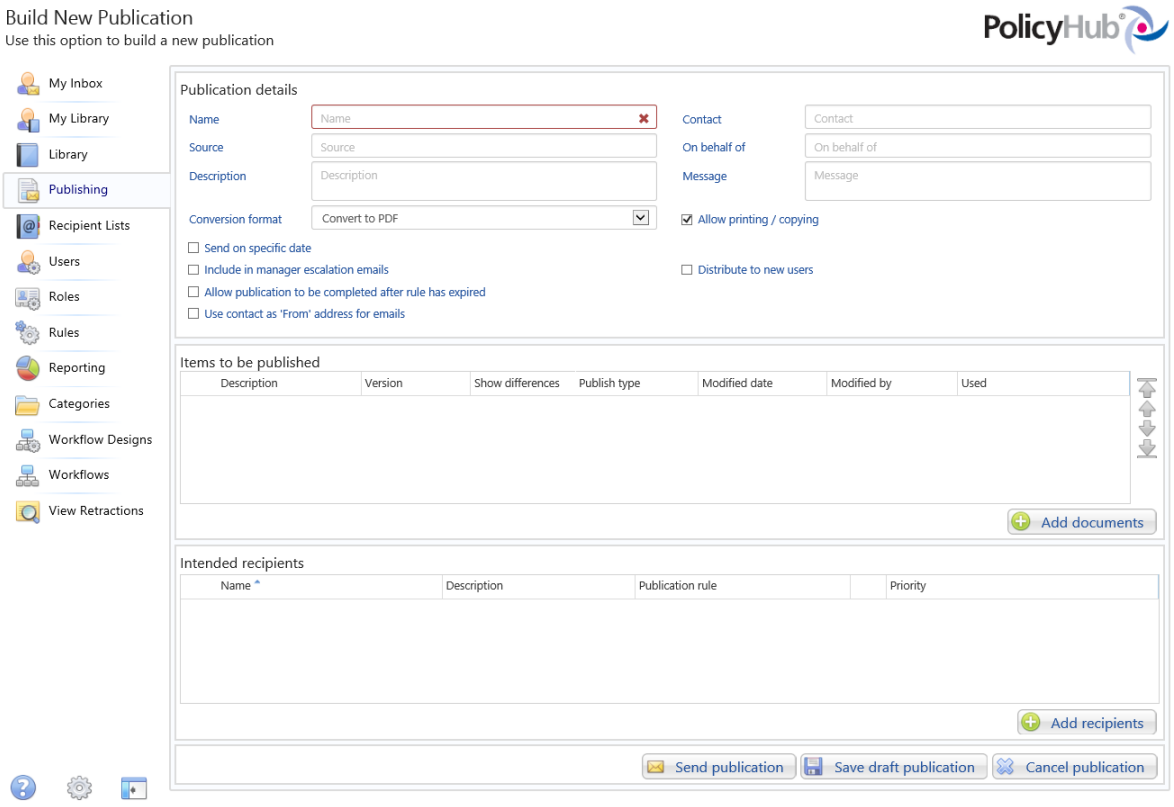


7. If required, continue adding more questions from the Test on the right. Click *Finished importing* to close the Test panel on the right.
8. Using the examples in this chapter, complete the Test.

5. Publishing Configuration Examples

Documents, Tests and Questionnaires are sent to Users in *Publications*. A Publication is simply one or more Documents, Tests and Questionnaires which are grouped together.

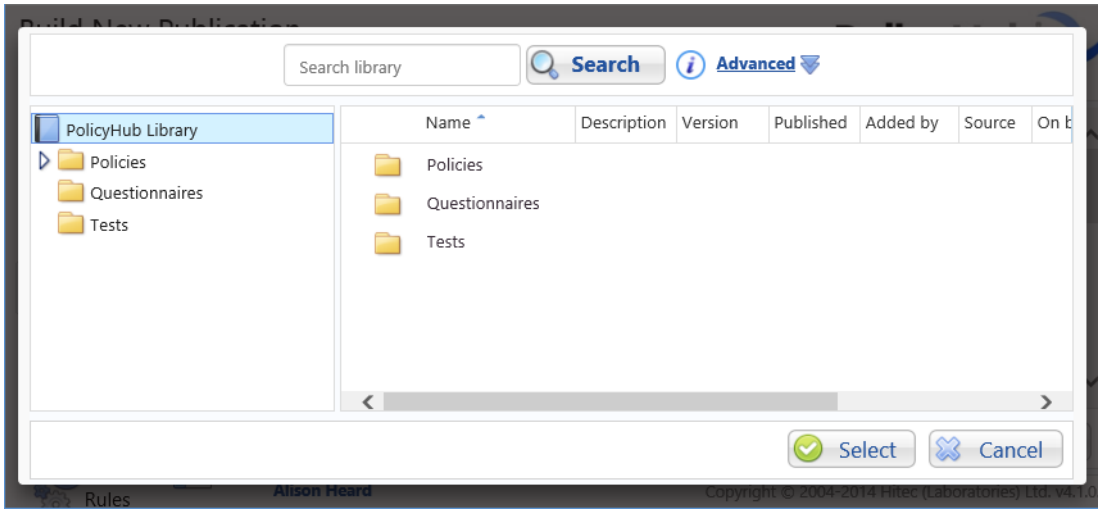
Select *Publishing* from the menu on the left.



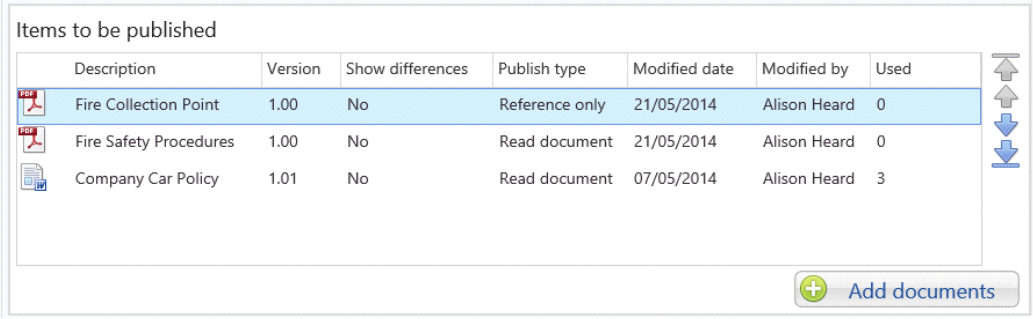
5.1. Publish Read Documents With A Reference Document

1. Click on the *Publishing* option in the main menu to display the *Build New Publication* page.
2. In this example you will send a Compliance Publication. That is, a publication containing Policy documents which the recipient must confirm they have read. Select the *Compliance* button at the top of the page (as shown in the above example).
3. Enter a name for the Publication, *Work Policies* in this example.
4. Enter your name for the *Source*.
5. In the description field, enter a brief description of what the Publication will contain. (For example, *Two new polices are included and a plan showing the fire collection point*.)
6. In this example, any Policies which are Word documents will be sent in PDF format. From the *Conversion format* drop-down list, select *Convert to PDF*.
7. Select the option *Allow printing/copying* so the recipients can print the PDF documents, if required.

8. In this example, the remaining Publication Details field can be left at their defaults. The next step is to add the Policies. Click the *Add documents* button. The library is displayed. Select the folder which contains the Policies you want to send.

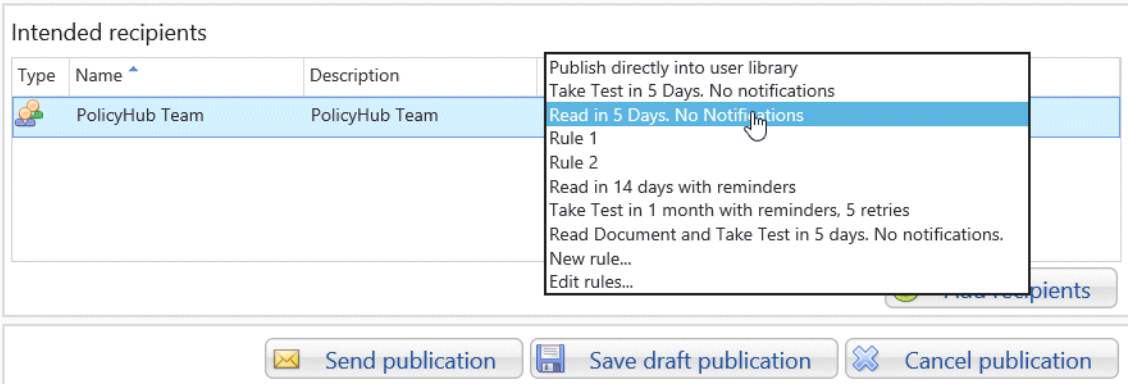


9. Multiple Policies can be added from the same folder by holding down the *Ctrl* key while clicking on the required documents. To add Policies from different folders, you must add Policies from one folder and then click the *Add documents* button again and repeat the process for the other folders.
10. Add all the required Policies and Reference Documents.
11. Make sure the *Publish type* of the Policies is set to *Read document*. For the reference document, click in the *Publish type* field and select *Reference only*. Recipients must confirm they have read the *Read Documents* (Policies) but they will not have to confirm they have read the reference document – this will be added to their libraries once they have confirmed they have read the Policies.



12. The final steps in this example are to add the recipients and select a publishing rule. Click the *Add recipients* button. The Recipient Lists are displayed. Select a Recipient List. Multiple Recipient Lists can be selected by holding down the *Ctrl* key while clicking on the Recipient Lists. It is also possible to create a new Recipient List from this screen, see "Creating A Recipient List While Creating A Publication" on page 63 for an example.

13. Click in the *Publication rule* field to select the Publishing rule to use for the selected Recipient List. Click in the *Publication rule* field to display the list of configured rules.

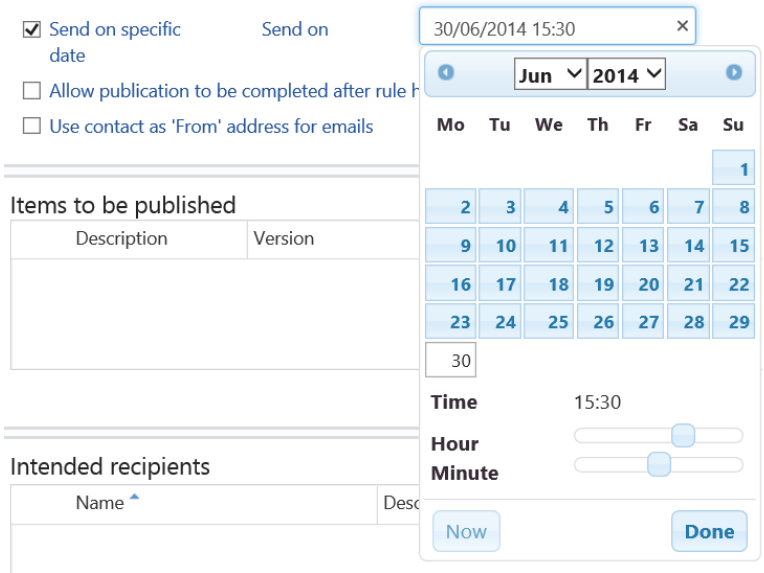


14. Select the required rule from the list. For this example Publication, select a rule which has Standard rule settings only – this example Publication cannot be sent if a rule which has Test rules included is selected.
15. Click the *Send publication* button to send the example Publication to everyone in the selected Recipient Lists. If any information is missing from the Publication, a message is displayed informing you what information needs to be added.
16. The *Publications* page is displayed showing all the Publications which include the item which was at the top of the list of *Items to be published* when the Publication was sent.

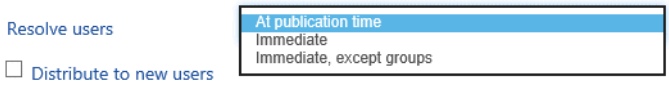
5.2. Scheduling A Delayed Publication

The Publication can either be sent when the *Publish items* button is clicked, or it can be sent on a specific date. By default, a Publication will be sent when the *Publish items* button is clicked.

To delay sending the Publication, select *Send on specific date*. The *Send on* field is displayed. This is used to schedule sending the Publication at a future date and time. Click in the *Send on* field and select a date from the pop-up calendar and use the *Hour* and *Minute* sliders to set the time the Publication will be sent. Alternatively, click the *Now* button to display the current date and time and then edit it as required. Click *Done* to save the date and time settings.



From the newly displayed *Resolve users* drop-down list, select when you want your Recipient List to be resolved (the contents of Recipient Lists and AD Groups checked and the status of all Users validated).



Select from:

- *At publication time – Users*, *Recipient Lists* and *Groups* are resolved at the time the Publication is sent. Any Users who are on the distribution list (either because they were added individually, added as a member of an AD Group or as a member of a Recipient List) but are in the *Disabled* or *Inactive* state *at the scheduled time of Publication* will not receive the Publication.
- *Immediate – Users*, *Recipient Lists* and *Groups* are resolved at the time the *Publish items* button is clicked. Any Users who are on the distribution list (either because they are added individually, added as a member of an AD Group or as a member of a Recipient List) but are in the *Disabled* or *Inactive* state at the time the *Publish items* button is clicked will not receive the Publication.
- *Immediate, except groups – Users* and *Recipient Lists* are resolved at the time the *Publish items* button is clicked. Any *Users* or *Recipient List* members who are on the distribution list but are in the *Disabled* or *Inactive* state at the time the *Publish items* button is clicked will not receive the Publication. *Groups* are resolved at the time the Publication is sent. Any *Group* members who are on the distribution list but are in the *Disabled* or *Inactive* state at the *scheduled time of Publication* will not receive the Publication.

Note: If you select *Send on specific date*, you cannot *Save draft publication* or *Save review*.

5.3. Distribute To New Users

To ensure Users added to a Group (or Users moved from one Group to another) receive the document, select the *Distribute to new users* tick box. The Publication is sent to the members of the *Recipient List*. As new Users are added to the *Group* (contained within the *Recipient List*), they will also be sent the Publication (until this option is turned off).

Note: The *Distribute to new users* option is used with *Groups* only. If the *Recipient List* does not contain any *Groups*, this option has no effect.

Note: The *Distribute to new users* option is available for Compliance Publications only – it is *not* available for Review Publications.

5.3.1. 'Distribute To New Users' Is Enabled At Publication Time

5.3.1.1. Scenario 1

A Publication is sent to a Recipient List which contains the Group *Slough*. All new Users added to the Group *Slough* will also receive the Publication (until the option *Distribute to new users* is cleared for the selected Publication).

5.3.1.2. Scenario 2

A Publication is sent to a Recipient List which contains another Recipient List named *Admin*. *Admin* contains Users only – no other Recipient Lists or AD Groups. New Users added to the Recipient List *Admin* will *not* receive the Publication because this option applies to *Groups* only.

5.3.1.3. Scenario 3

A Publication is sent to a Recipient List which contains the Group *Slough*. The Group *Slough* is then *removed* from the Recipient List. New Users are added to the Group *Slough*. All new Users added to the Group *Slough* will also receive the Publication because the Publication is sent to a historic version of the Recipient List, with the contents as they were at the time the Publication was sent.

5.3.2. 'Distribute To New Users' Is Enabled One Week After The Publication Is Sent

5.3.2.1. Scenario 1

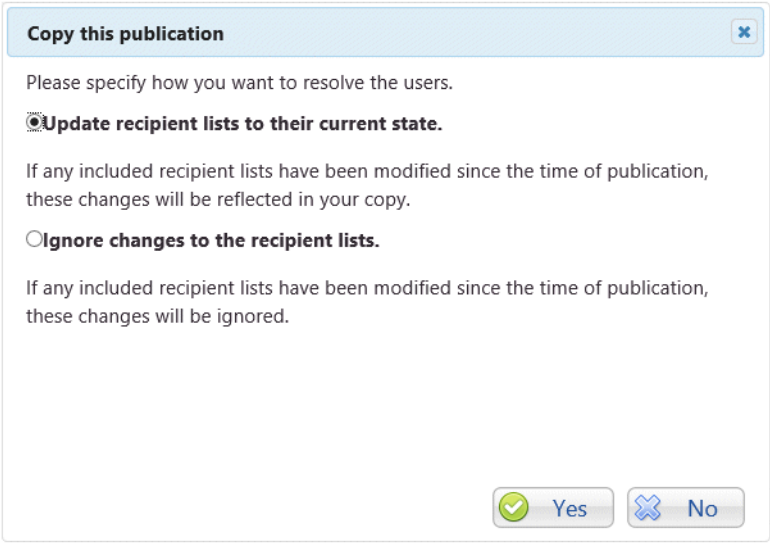
A Publication is sent to a Recipient List which contains the Group *Slough*. New Users are added to the Group *Slough* two days after the Publication was sent. None of those new Users will receive the Publication because they were added to the Group after the Publication was sent but before the *Distribute to new users* option was enabled.

5.3.2.2. Scenario 2

A Publication is sent to a Recipient List which contains the Group *Slough*. New Users are added to the Group *Slough* eight days after the Publication was sent. All of those new Users will also receive the Publication because they were added to the Group after the *Distribute to new users* option was enabled.

5.4. Copy A Publication Which Was Sent One Year Ago

When you copy an old Publication which was originally sent to a Recipient List whose membership has changed, a dialog is displayed.



Update recipient lists to their current state – select this option to resolve the Recipient Lists so the copied Publication will be sent to all the Users in the current versions of the Recipient Lists and Groups who have an *Active* and *Enabled* status.

Ignore changes to the recipient lists – select this option to use the same version of the Recipient Lists as was used in the original Publication. The copied Publication will be sent to all the *Active* and *Enabled* Users in the original versions of the Recipient Lists and Groups. It will not be sent to any Users who have been added since.

5.5. Publishing To A User In Multiple Recipient Lists

It is possible to have multiple Recipient Lists with each Recipient List having a different Publication rule.

Priority is used to resolve ambiguity between conflicting *Recipient Lists* for a given publication request. *Person 1 is in both Recipient Lists* and so both Recipient Lists apply. However, only one publication request can be sent. *Priority* resolves this problem by selecting which Recipient List to send to *Person 1*. (The Recipient List with the *higher Priority* will be sent.)

Note: If both Recipient Lists were set to the same priority, the system would not be able to send the document to the same recipient in both groups, therefore an error message is displayed.
The document publisher must select different priorities for each Recipient List or remove the recipient from one of the Recipient Lists.

1. Click the *Add recipients* button to open the *Recipient Lists* page. Multiple Recipient Lists can be selected by holding down the *Ctrl* key while you click on all the required items. Consecutive Recipient Lists can be selected by holding down the *Shift* key and clicking on the first item in the list and the last item in the list. Click the *Select* button.
2. For each Recipient List, click in the *Publication rule* box and select a Publication rule for each Recipient List.

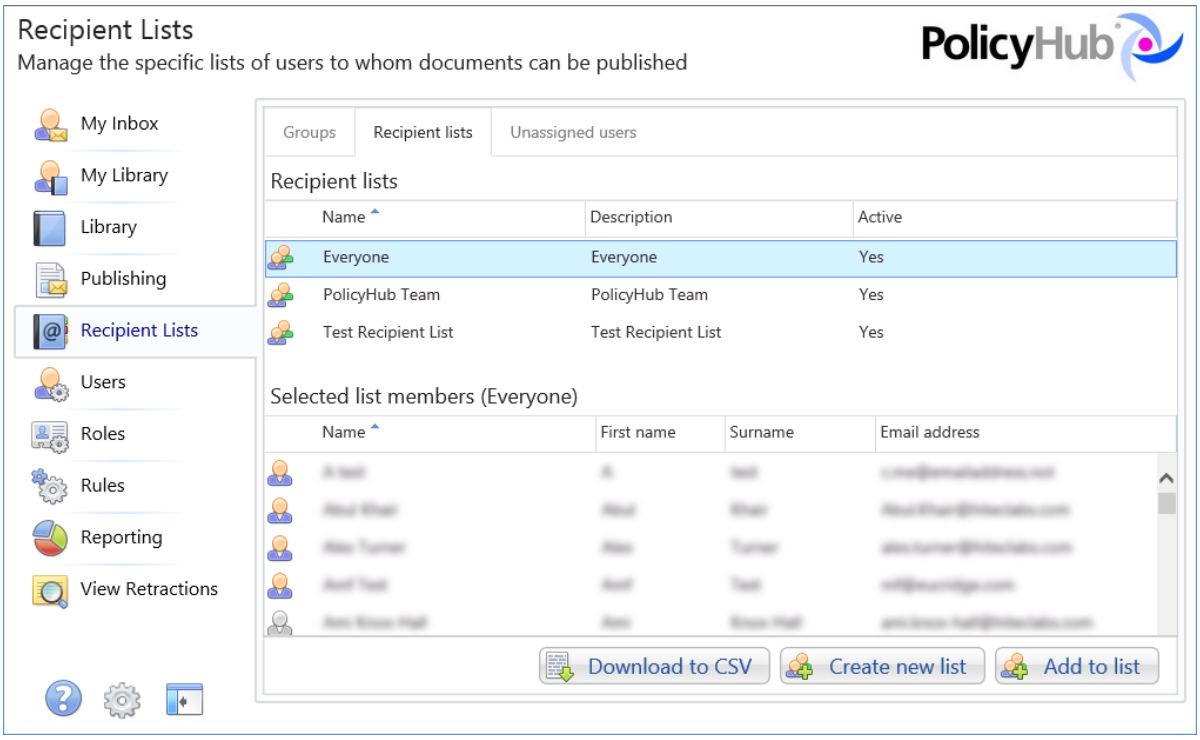
3. In this example, Recipient List 1 will use Rule 1 and Recipient List 2 will use Rule 2.

4. By default, the priority of all Recipient Lists is set to *Normal*. To change a Recipient List's priority, select the Priority for the Recipient List whose Priority you want to change. Select a higher, or lower Priority from the List. In this example, Recipient List 1 is given the Priority *High*.

5. Complete the Publication as required and click the *Send publication* button to send the example Publication to everyone in the selected Recipient Lists. If any information is missing from the Publication, a message is displayed informing you what information needs to be added.

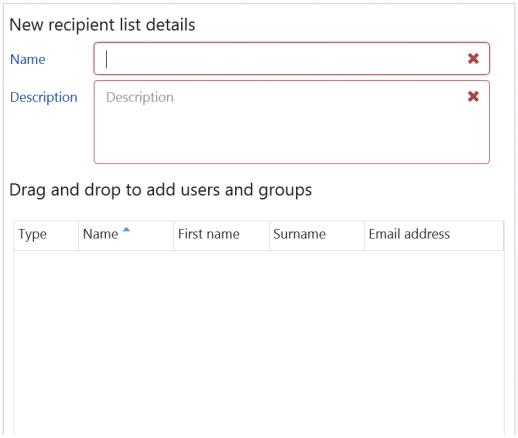
6. Recipient List Configuration Examples

This enables you to easily select the Users you want to receive a Publication without having to select all the Users individually.



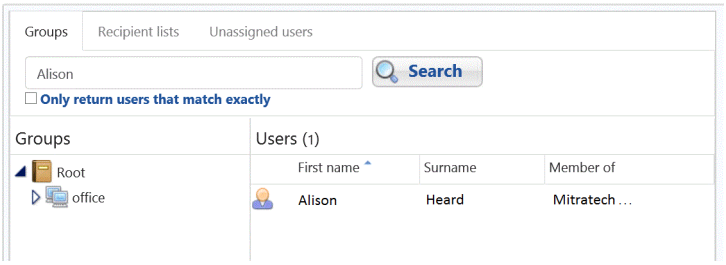
6.1. Creating A Recipient List

1. Click *Recipient Lists* in the main menu.
2. Click *Create new recipient list*.

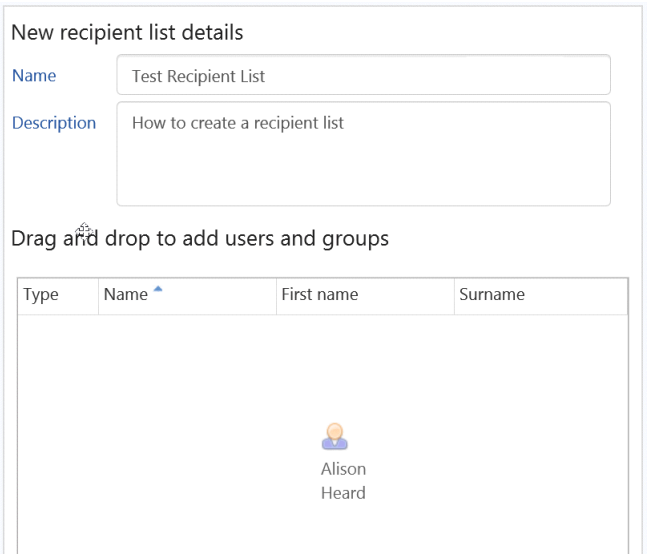


3. In the *Name* box, type a name for the Recipient List that will make it easily identifiable. In the *Description* box, add a description of the Recipient List.

4. To add a User, click on the *Groups* tab and enter part or all of the name of the User you want to add to the Recipient List, then click *Search*. Names returned from the search are listed in the *Users* pane.

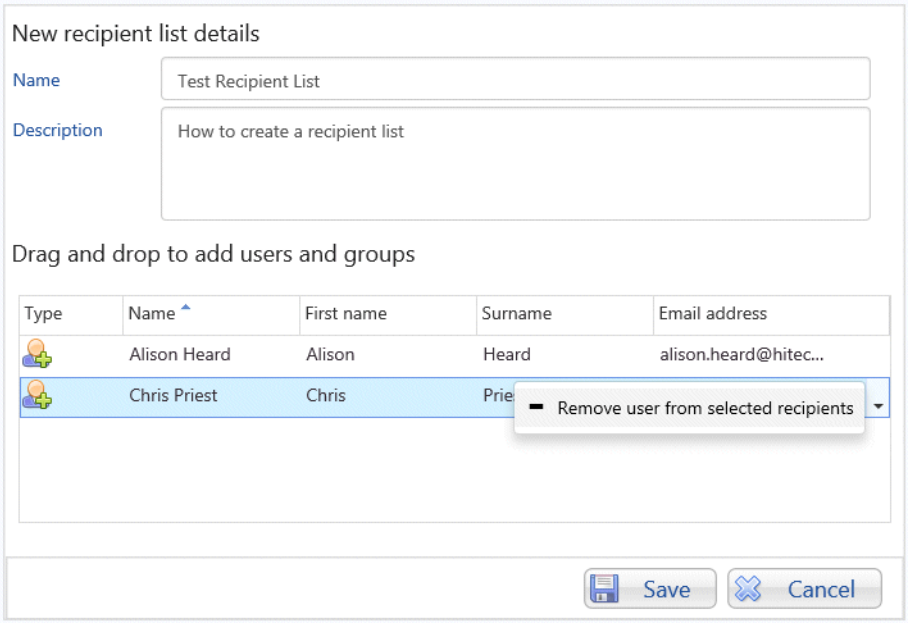


5. Select the Users you want to add to the Recipient List and drag them to the pane below *Drag and drop to add users and groups*, on the right. Drag and drop Users, Groups or Recipient Lists to the list of members. Click on the items you want to add, while holding down the *Ctrl* key. Alternatively, use the *Shift* key to select a consecutive list of recipients by clicking the first recipient in the list and the last recipient. Drag the required item(s) to the list of members on the right.



6. In a similar way, you can select existing Recipient Lists from the *Recipient lists* tab or Groups from the *Groups* tree-view and drag them to the new Recipient List.
7. Users can also be added to the new Recipient List from the *Unassigned users* tab.

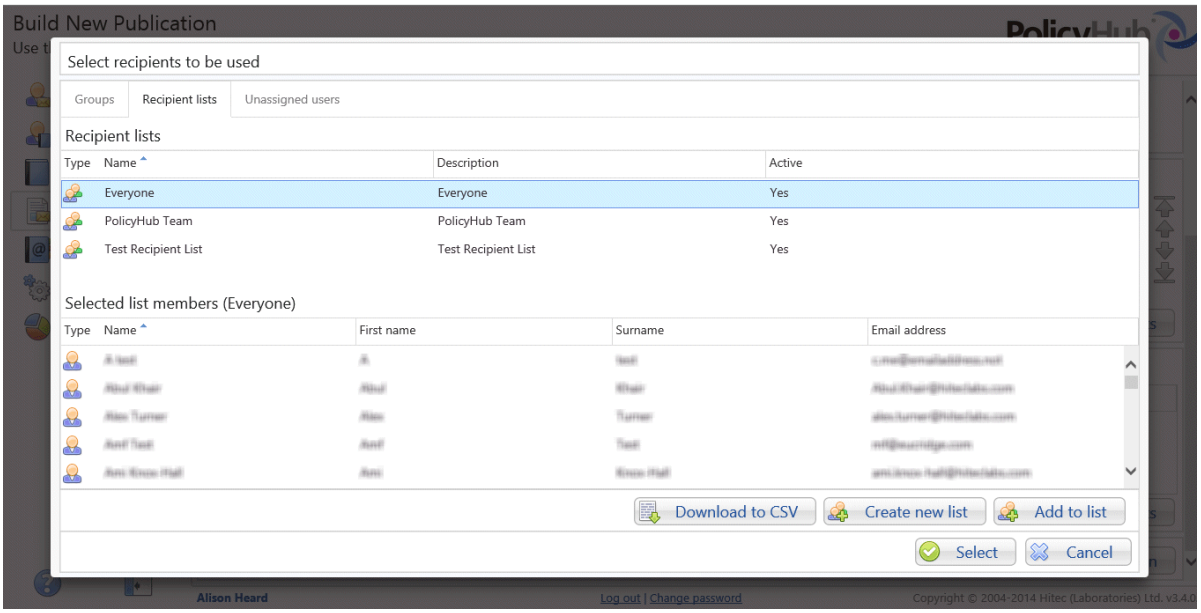
8. A member can be removed from the Recipient List by selecting the member, clicking on the black triangle on the right and selecting *Remove user from selected recipients* or *Remove recipient list from selected recipients*, as appropriate.



9. The selected member is removed from the Recipient List.
10. Click *Save* to save the Recipient List.

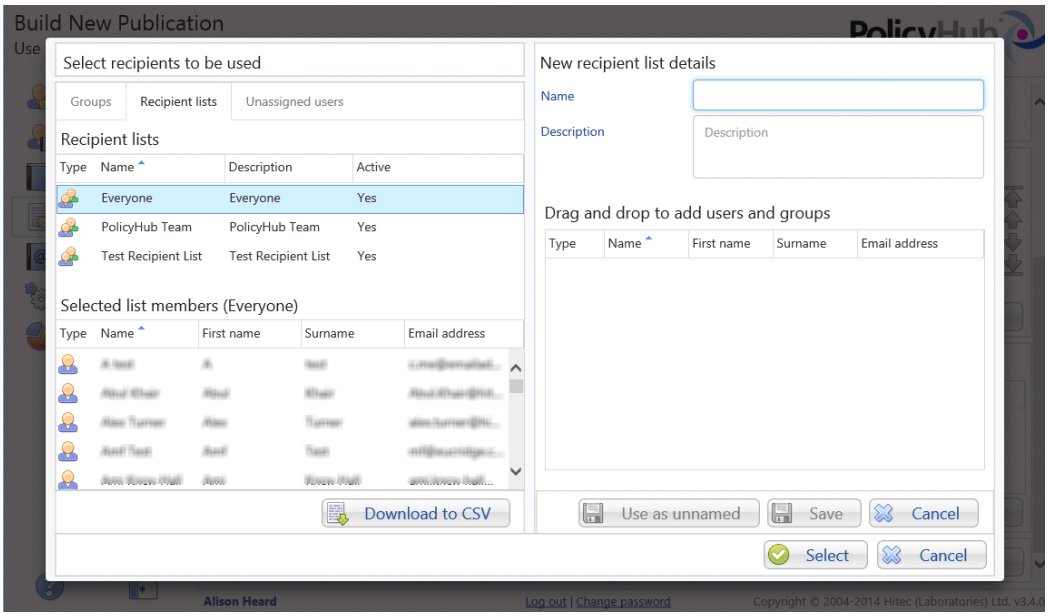
6.2. Creating A Recipient List While Creating A Publication

When you click *Add recipients* on either the *Build New Publication* page or the *Build Review Publication* page, you can either use an existing Recipient List or you can create a new one.



6.2.1. Create New List/Add To List

When you click *Create new list*, you can add Users, Recipient Lists and/or Groups to a new (empty) Recipient List. When you click *Add to list*, you create a new Recipient List with the currently selected Users, Recipient Lists or Groups added to it.



1. Add the required Users, Recipient Lists and/or Groups to the new list (see “Creating A Recipient List” on page 61 for details).
2. When you are creating a Recipient List from the *Build New Publication* page or the *Build Review Publication* page, you can either *Save* the Recipient List with a name, or click *Use as unnamed* to use the newly created Recipient List without saving it with a name. The (named or unnamed) Recipient List is then added to the Publication. A *named* Recipient List can be selected from the available Recipient Lists and reports for that Recipient List can be viewed. However, an *unnamed* Recipient List cannot be used again and it cannot be reported on (although reports can still be viewed for the Publication).

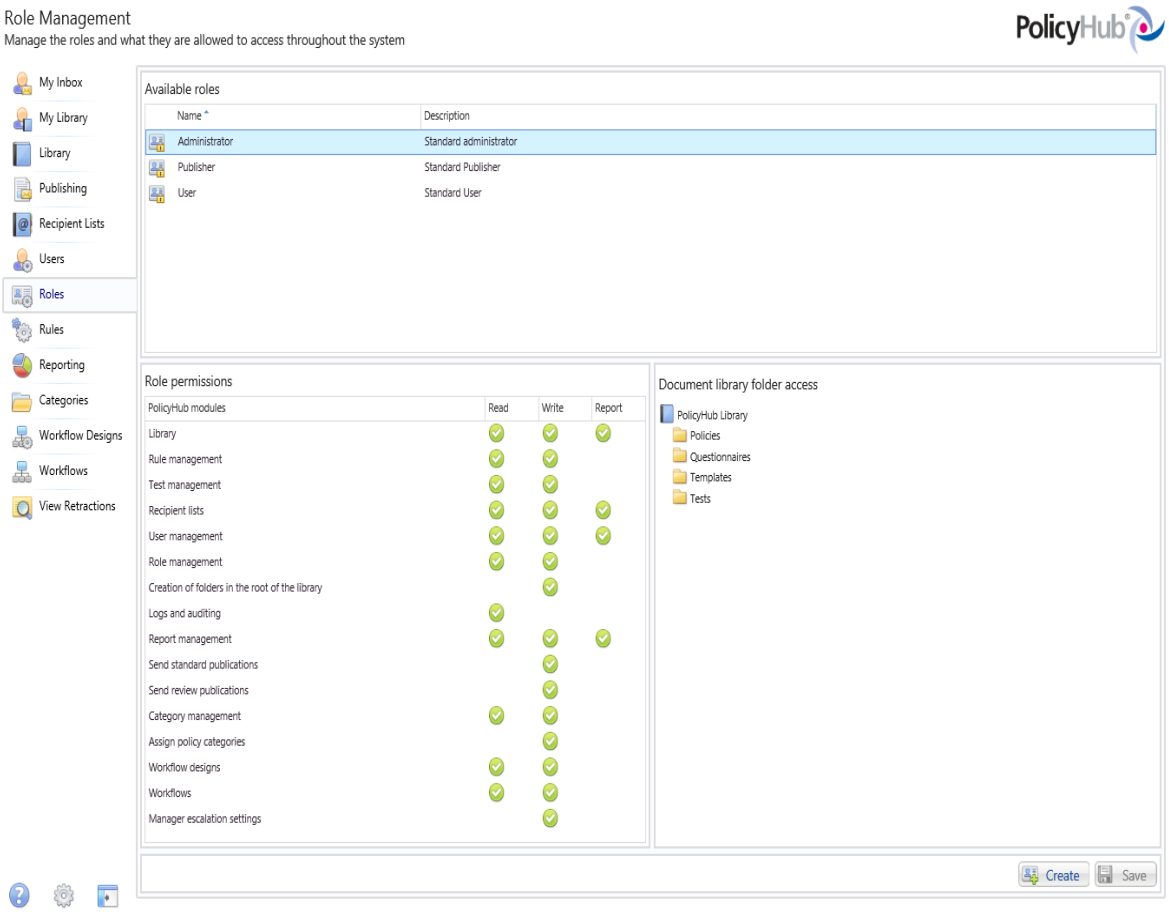
7. Role Configuration Examples

Roles are used to group Users who will have the same permissions within PolicyHub.

7.1. Create A New Role And Deny Access To A Folder

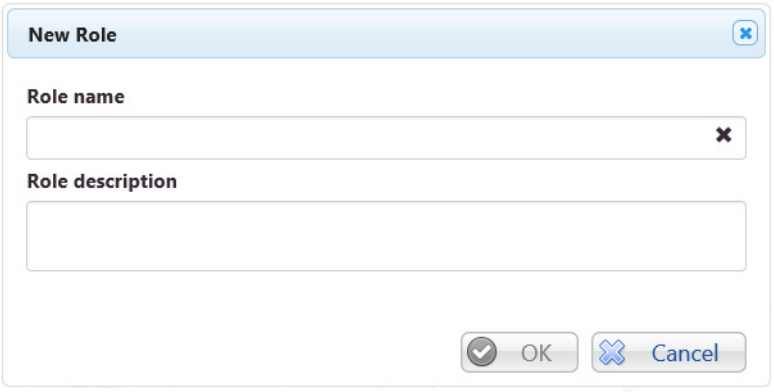
This example assumes your PolicyHub library contains three folders: Policies, Questionnaires and Tests. These top-level folders can have sub-folders.

Select *Roles* from the menu on the left.



7.1.1. Create A New Role

1. Click the *Create* button to create a new Role. The *New Role* dialog is displayed.



2. Enter the name of the new Role in the *Role name* box. In this example, enter Users (limited folder access).
3. If required, enter a description in the *Role description* box.
4. Press *OK* to save the Role or *Cancel* to close the dialog without saving the new Role.

7.1.2. Changing The Access Permissions For The New Role

In this example, the members of the Role *Users (limited folder access)* have the following permissions:

Library – Read/Write

Rule management – Read

Test management – Read

Recipient lists – Read/Write/Reports

User management – Read/Report

Role management – Read

Creation of folders in the root of the library – No Write permission

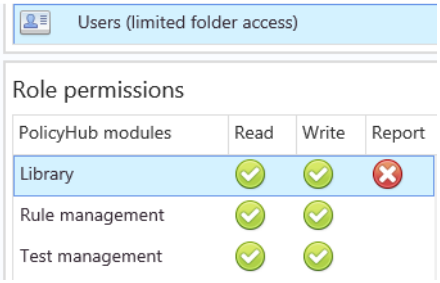
Logs and auditing – No Read permission

Report management – Read/Write/Reports

Send review publications – Write

Send standard publications – Write

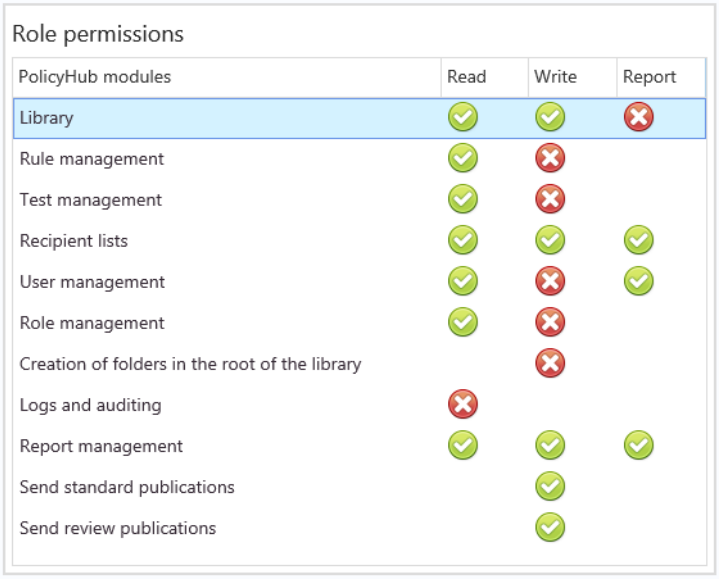
1. All the permissions for the new Role are enabled.
2. Click on the green icon for *Library* for the *Report* permission. It turns red showing the *Report* permission is now denied.



3. Click on the green icon for the Write permission for *Rule management*. It turns red showing the *Write* permission for *Rule management* is now denied.
4. In a similar way, *turn off* permissions for the following modules:

- *Test management* – Write
- *User management* – Write
- *Role management* – Write
- *Creation of folders in the root of the library* – Write

- *Logs and auditing* – Read

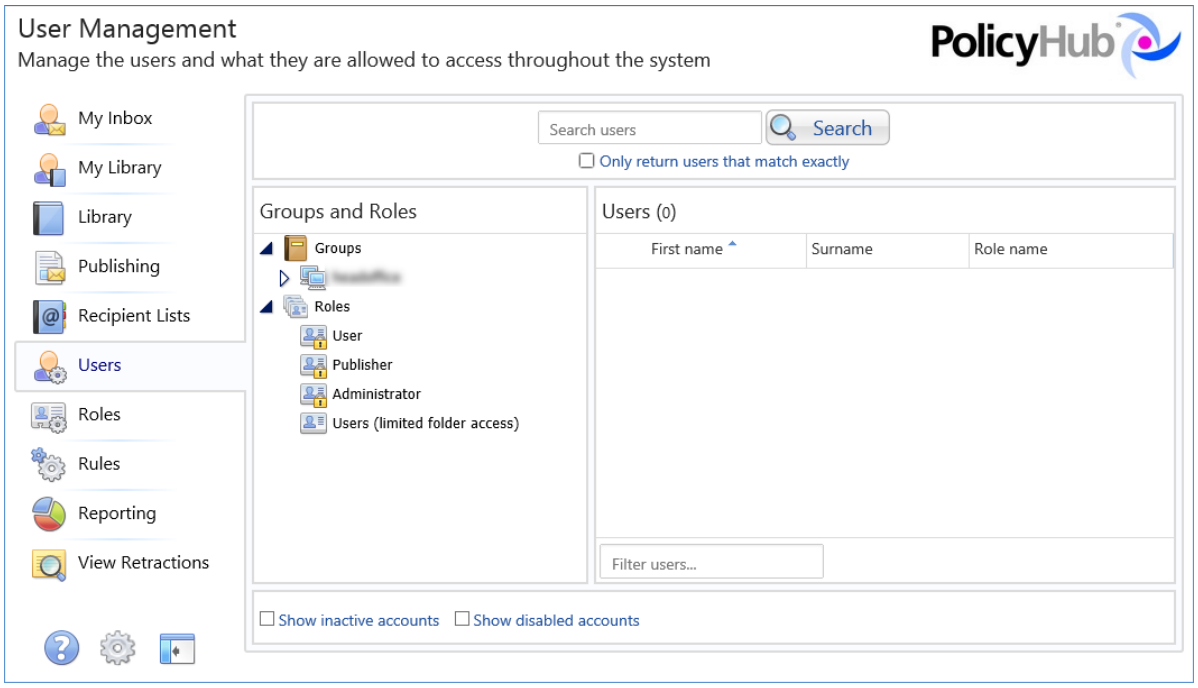


5. Click *Save* to save the changes.

7.1.3. Add Users To The New Role

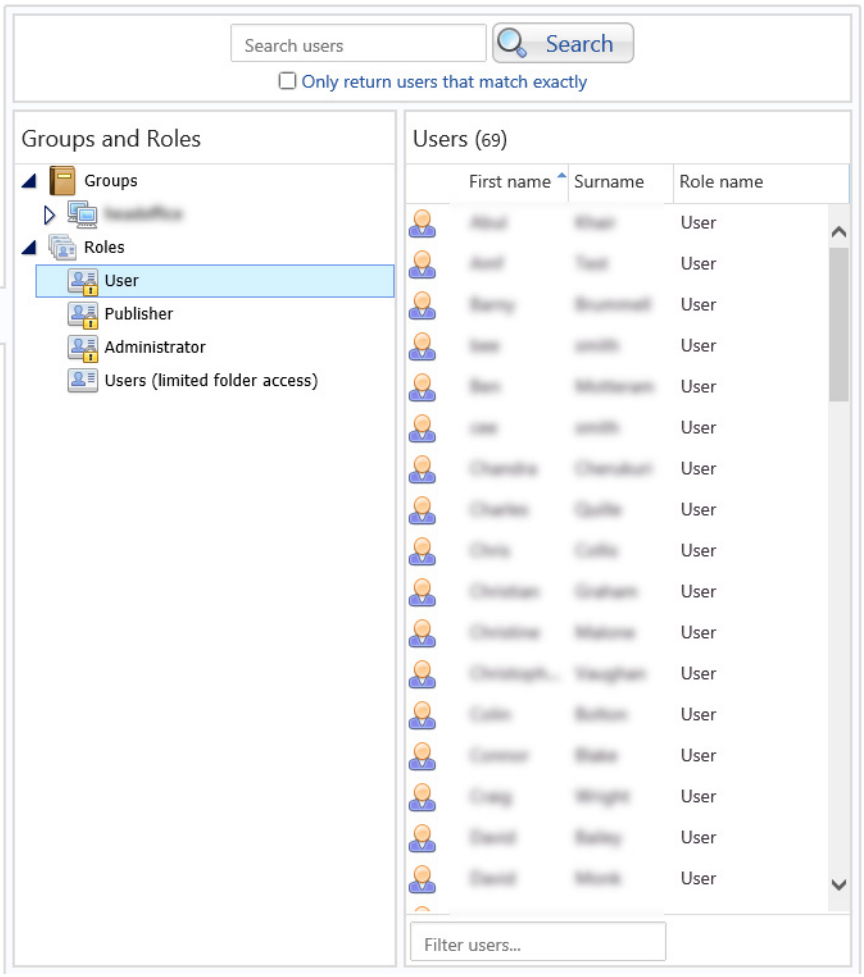
A PolicyHub User can belong to one Role only. In this example, some of the members of the standard Role *Users* will be moved to the new Role *Users (limited folder access)*.

1. Select *Users* from the menu on the left to display the *User management* page.



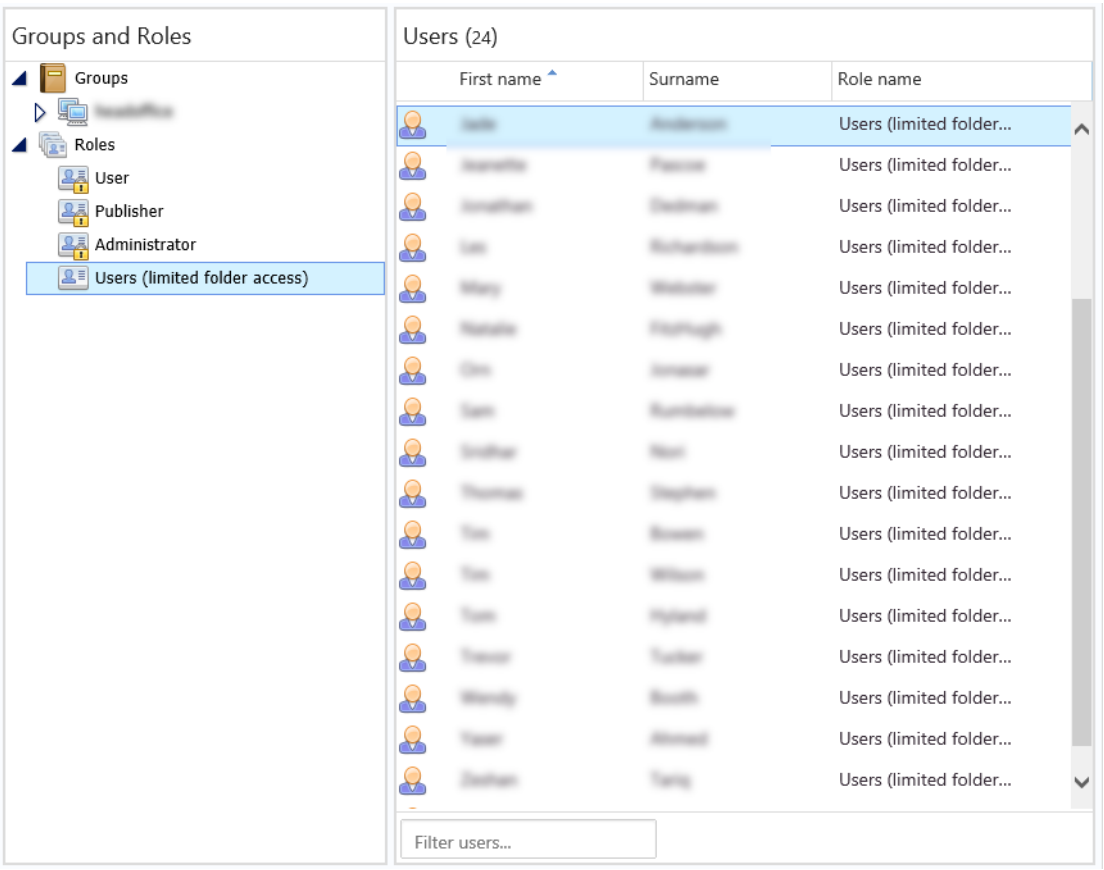
2. Locate the Users you want to add to the new Role. This can be done by searching for names and then dragging the required Users to the Role on the left. Alternatively, expand the Groups tree until you locate the Group containing the User you want to add to the

new Role. In this example, some of the Users in the Role *User* will be moved to the new Role. Select the Role *User* in the *Groups and Roles* pane.



3. Consecutive Users can be selected by selecting the first User, and, while holding down the *Shift* key, selecting the last User in the list. Non-consecutive Users can be selected by holding down the *Ctrl* key while clicking on the Users. Drag and drop the selected User(s) to the new Role *Users (limited folder access)*.

4. Select the new Role *Users (limited folder access)* in the Groups and Roles pane to check all the required Users have been moved to the new Role.

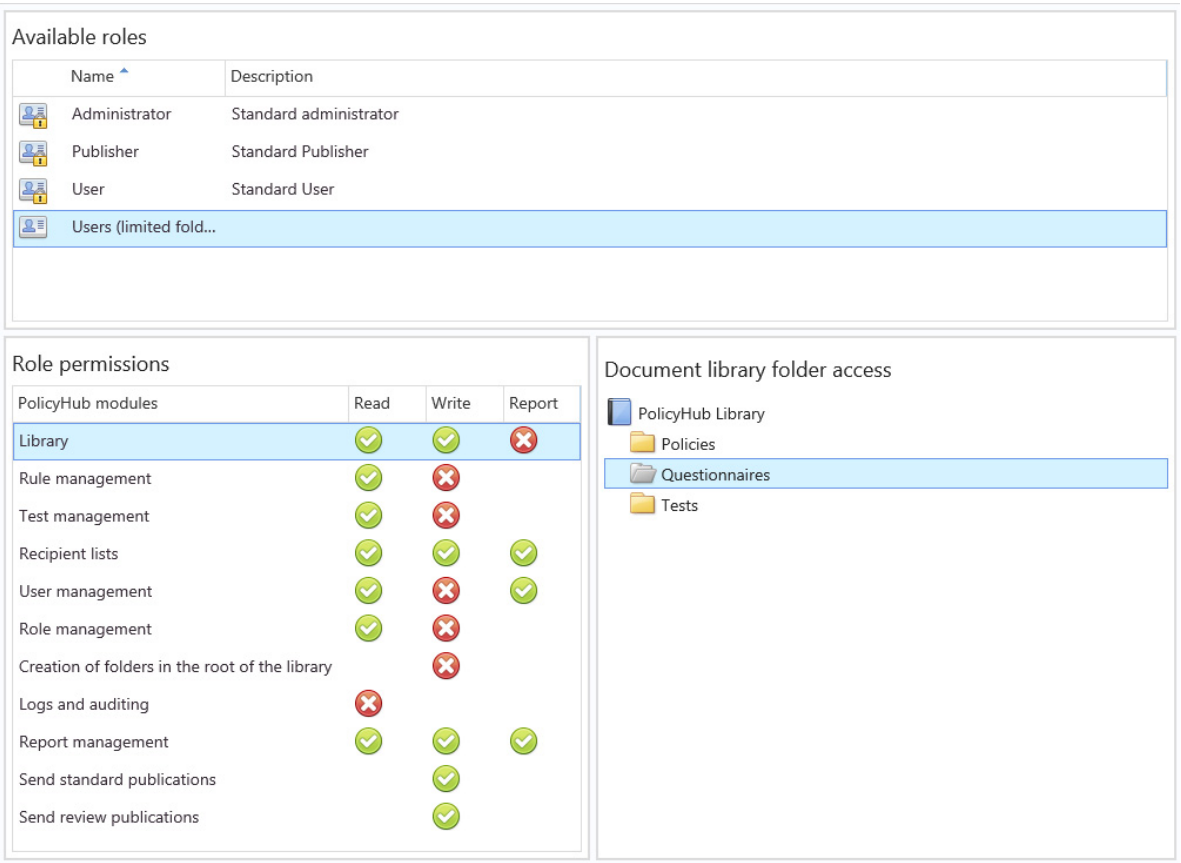


7.1.4. Deny Access To A Folder

On the *Role Management* page, you can also set up a Role's access permissions to particular folders in the PolicyHub library. In this example, the Users belonging to the Role *Users (limited folder access)* do not have access to the *Questionnaire* folder in the PolicyHub library.

1. Select *Roles* from the menu on the left.
2. Select the Role *Users (limited folder access)*. Right-click on the folder *Questionnaires* and select *Deny access* from the menu. The folder colour changes from yellow to grey to indicate the members of the selected Role do not have access to the Questionnaires folder.

3. Click *Save* to save the changes.



The members of the selected Role will now be denied access to the selected *PolicyHub Library* folders.

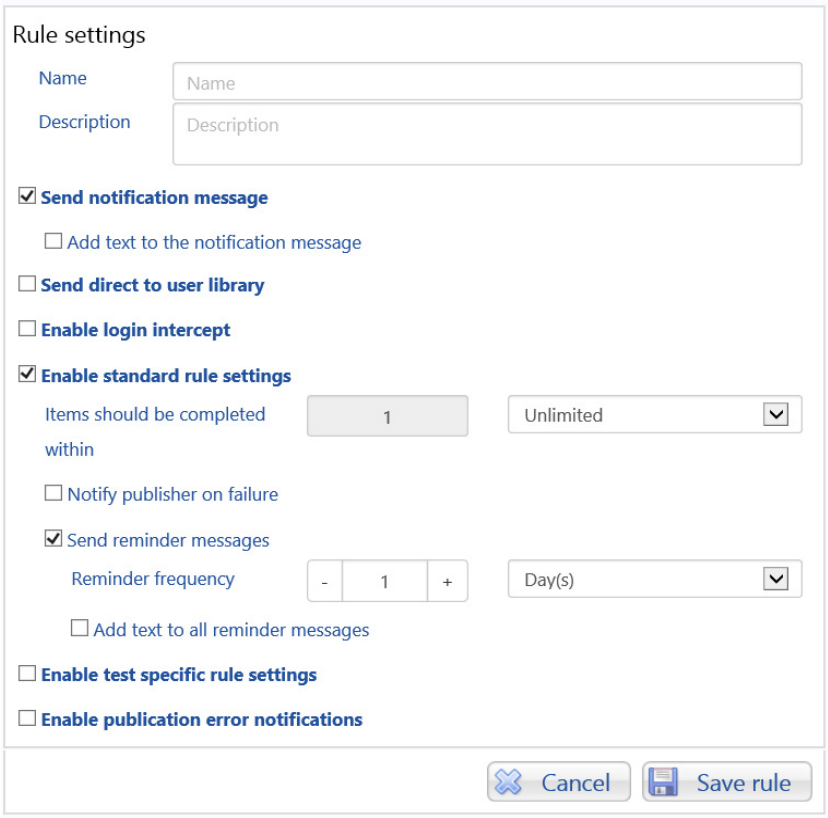
8. Rule Configuration Examples

Rules are used to Publish Documents, Tests and Questionnaires and to specify if the Recipients are notified, how much time they are given and whether they can re-take a Test if they failed it.

8.1. Creating A Rule For Documents

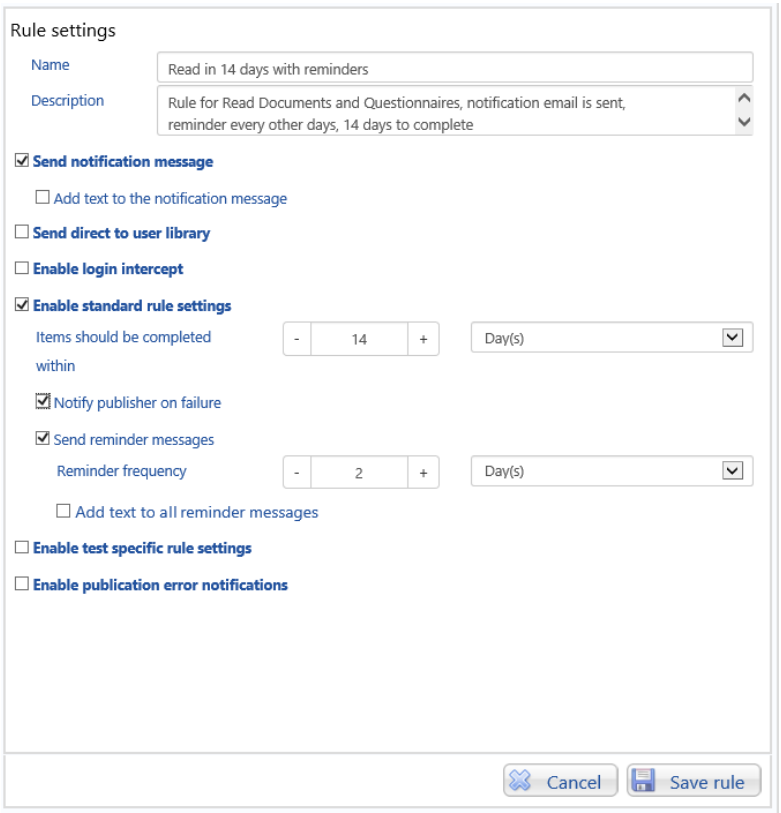
This example shows how to create a standard rule to be used when Publishing a Document or Questionnaire. It gives the Recipients 14 days to complete the items in the Publication and sends them a reminder every other day if they have not yet completed the Publication.

1. Select *Rules*, and click the *Create new rule* button.



2. Enter a *Name* (for example, *Read in 14 days with reminders*) and a *Description* (for example, *Rule for Read Documents and Questionnaires, notification email is sent, reminder every other days, 14 days to complete*) for the rule.
3. In this example, notifications emails are sent to the recipients telling them they have a new Publication in their Inbox. Therefore, ensure the option *Send notification message* is *selected*. In this example, no extra text will be added to the notification email so ensure the option *Add text to the notification message* is *cleared*.
4. This rule is *not* a Login Intercept rule, so ensure *Enable login intercept* is *cleared*.
5. Documents and Questionnaires are sent using the standard rule settings so ensure *Enable standard rule settings* is *selected*.
6. This rule will give each recipient 14 days to confirm Documents as read or to return Questionnaires. First, click on *Unlimited*, and select *Day(s)* from the drop-down list. Next, enter 14 in the *Items should be completed within* text box. (You will not be able to change the number until *Unlimited* has been changed to *Day(s)*, *Week(s)*, *Month(s)* or *Year(s)*.)

7. For this rule, if a recipient does not confirm a Document as read or does not return a Questionnaire within 14 days, the Publisher will be notified (via an email message). Therefore, ensure the option *Notify publisher on failure* is selected.
8. This rule will send a reminder message to all recipients who have not yet completed all the items in the Publication. This message will be sent every other day. Ensure the option *Send reminder messages* is *selected*. Set the *Reminder frequency* to *2 Day(s)*.
9. In this example, no extra text will be added to the reminder email so ensure the option *Add text to all reminder messages* is *cleared*.

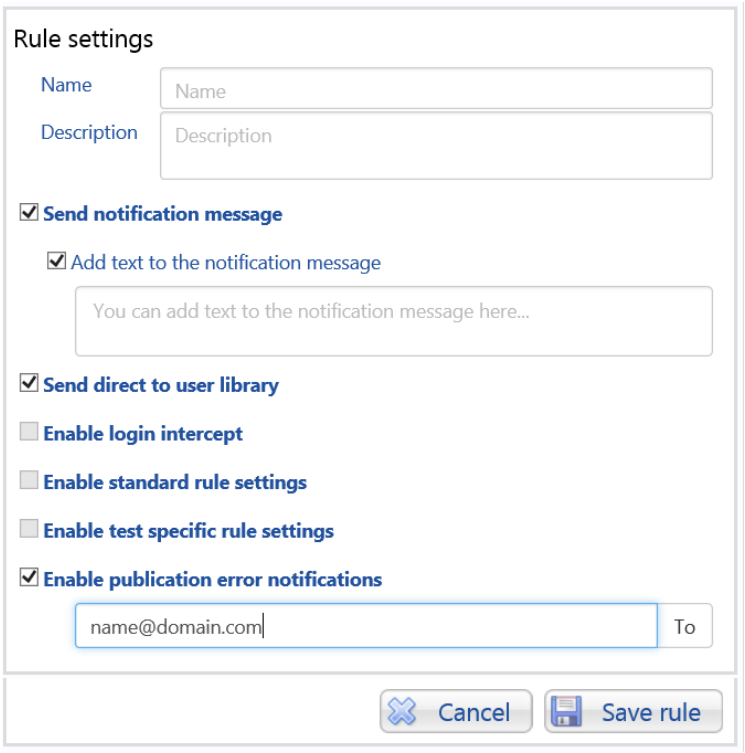


Note: To send a Publication with an escalating reminder message see "Send Escalating Reminder Messages" on page 73

10. The option *Enable publication error notifications* is used to define who should be notified if the Publication goes to Error state. It is not used in this example. Click *Save rule* to save the new rule for Documents and Questionnaires.

8.1.1. Send Direct To User Library

1. In the following example a notification email is sent to recipients informing them they have a new Publication in their Library. Additional text can be added to the notification message by selecting the *Add text to the notification message* option and typing the desired text.
2. The option *Enable publication error notifications* is used to define who should be notified if the Publication goes to Error state.
3. With the *Send direct to user library* option *selected*, the *Enable login intercept*, *Enable standard rule settings* and *Enable test specific rule settings* are disabled.

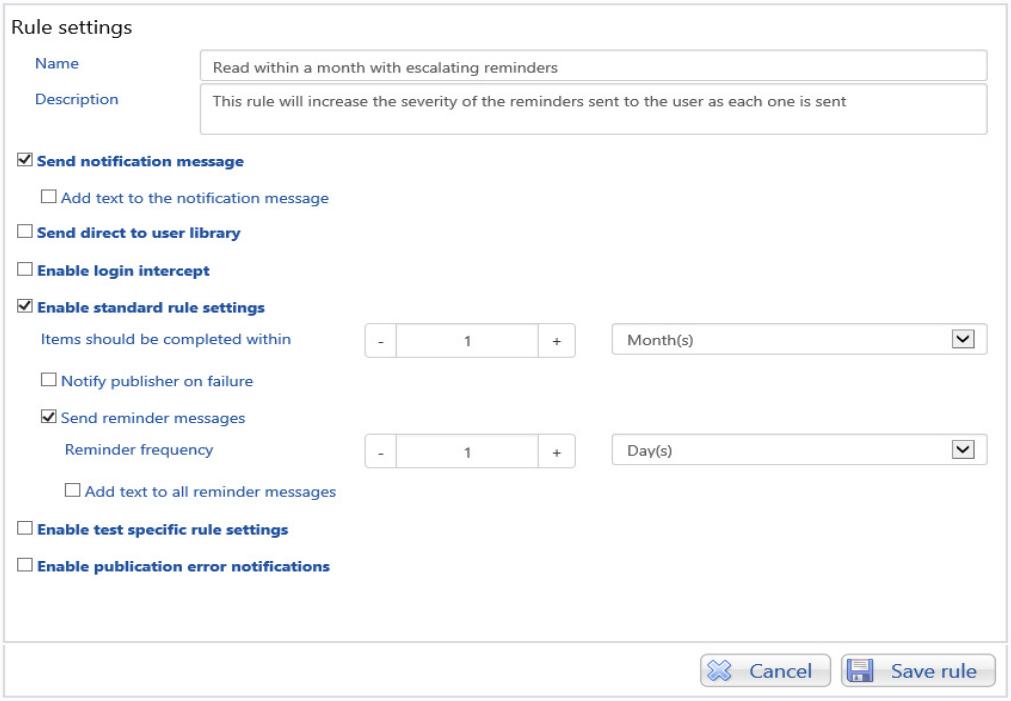


Note: Documents with Tests and/or Questionnaires cannot be sent with the *Send direct to user library* option.

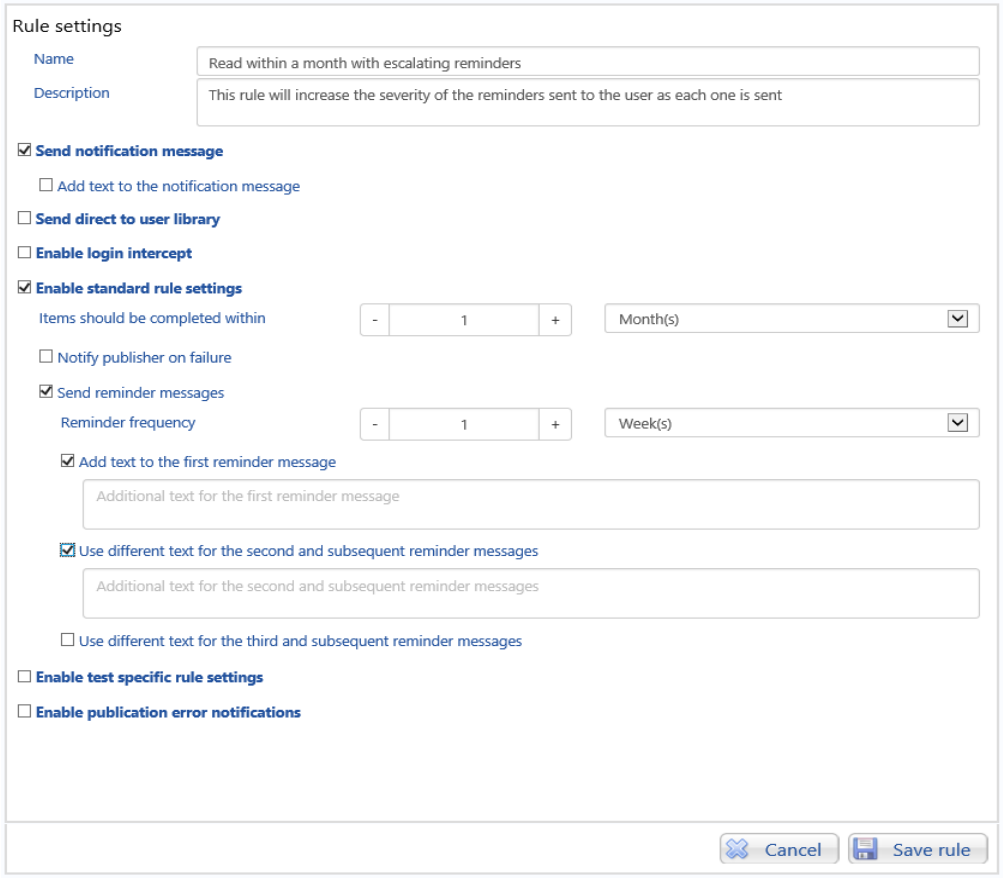
8.1.2. Send Escalating Reminder Messages

1. Escalating reminder messages can be sent to recipients with the option to change the wording of the message each time a reminder message is sent. This is useful when a recipient is to be reminded to read a Publication or answer a Test. As the completion deadline approaches a stronger reminder message is sent. Escalating reminder messages can be sent with Documents and Tests.

2. In the following example, different text will be sent with the first and subsequent reminder messages, therefore the option *Add text to all reminder messages* must be *selected*.

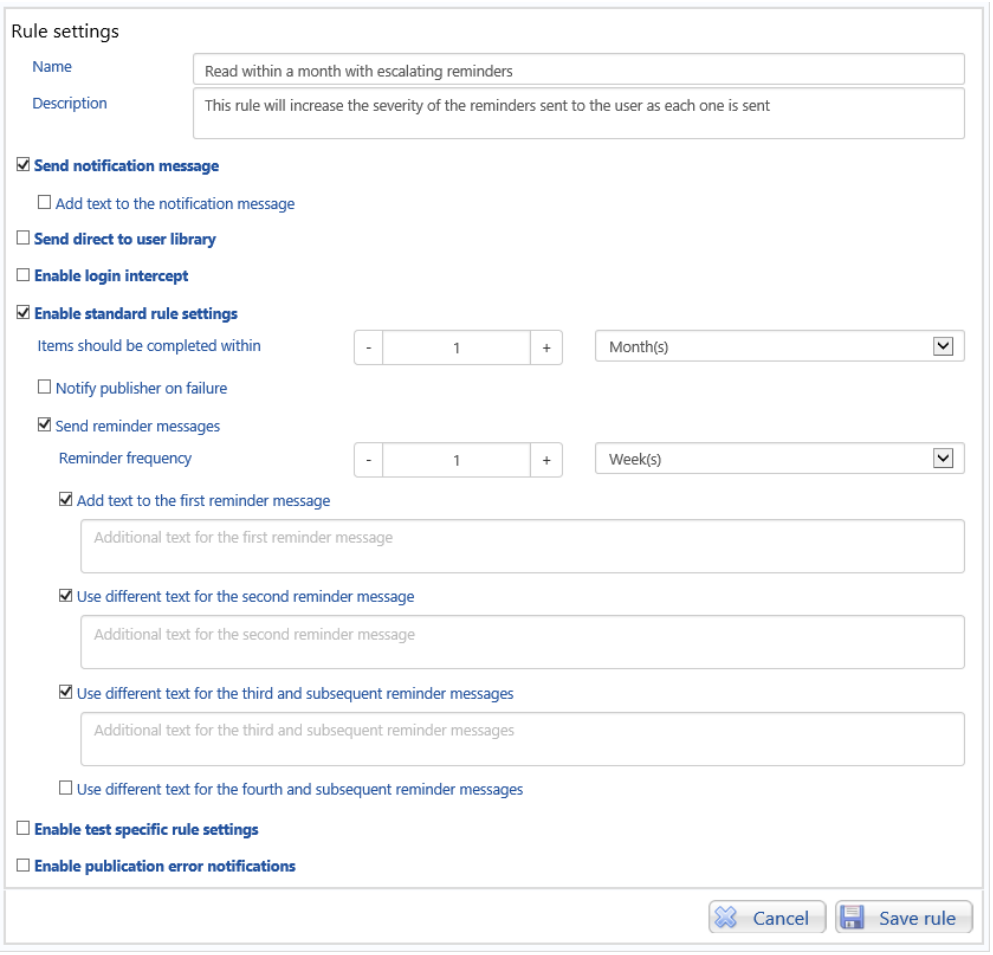


3. In this example, when *Add text to all reminder messages* is *selected,* the dialog *Add text to the first reminder message* becomes available. The dialog *Use different text for the second and subsequent reminder messages* is also *selected*.

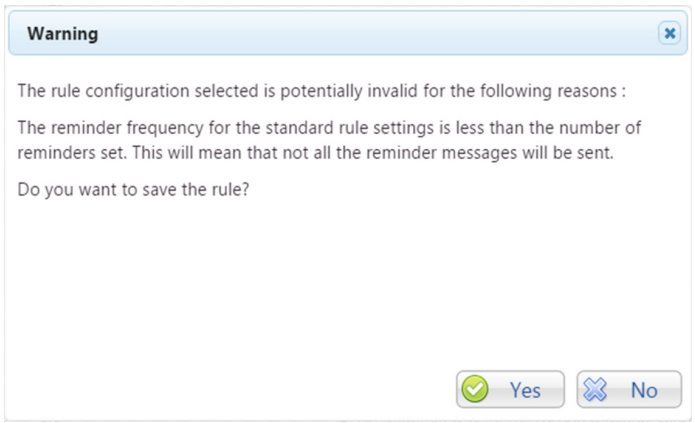


Note: If the *Use different text for the second and subsequent reminder messages* is not *selected* all subsequent reminder messages sent will be the same as *Add text to the first reminder message.*

4. This rule gives a recipient 1 month to confirm the Documents as read. A reminder message will be sent weekly with the same text in the second and subsequent messages.
5. In the following example, different text will be sent with the first, second and third reminder message. Because *Use different text for the fourth and subsequent reminder messages* is not *selected* the fourth message will be the same as the third and subsequent reminder messages.



6. If the number of reminder messages is greater than the number of configured reminders for the rule, the following warning will be displayed.

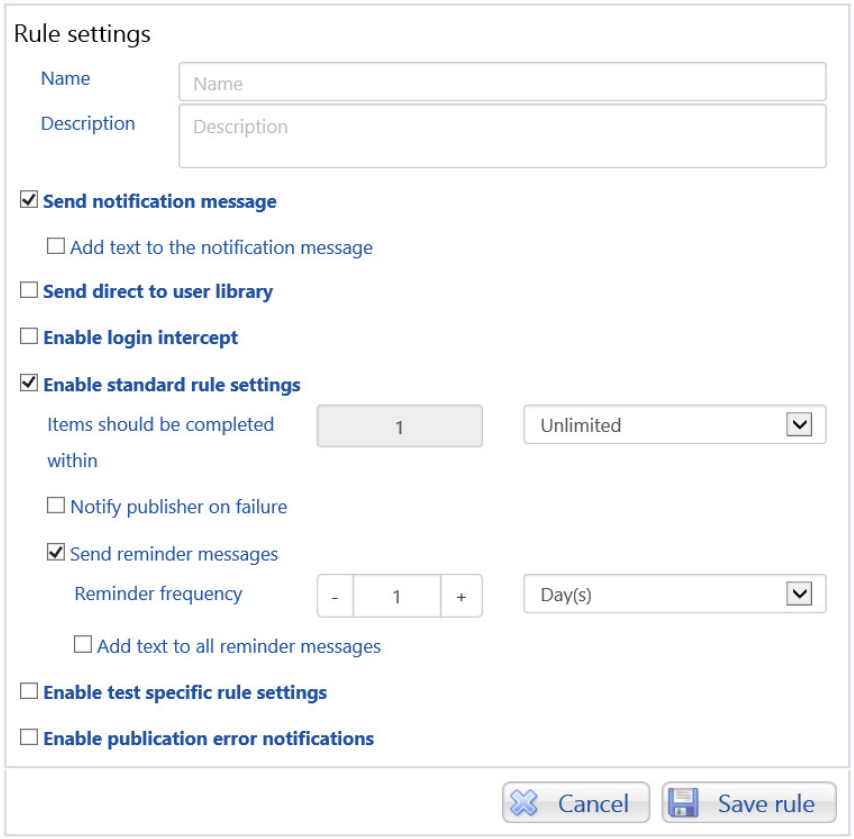


7. If any of the subsequent reminder messages are *de-selected*, the message is held in memory and will remain available if later the subsequent reminder message is *re-selected*. Once the rule is saved, any unused reminder messages are not saved in the rule.

8.2. Creating A Rule For Tests

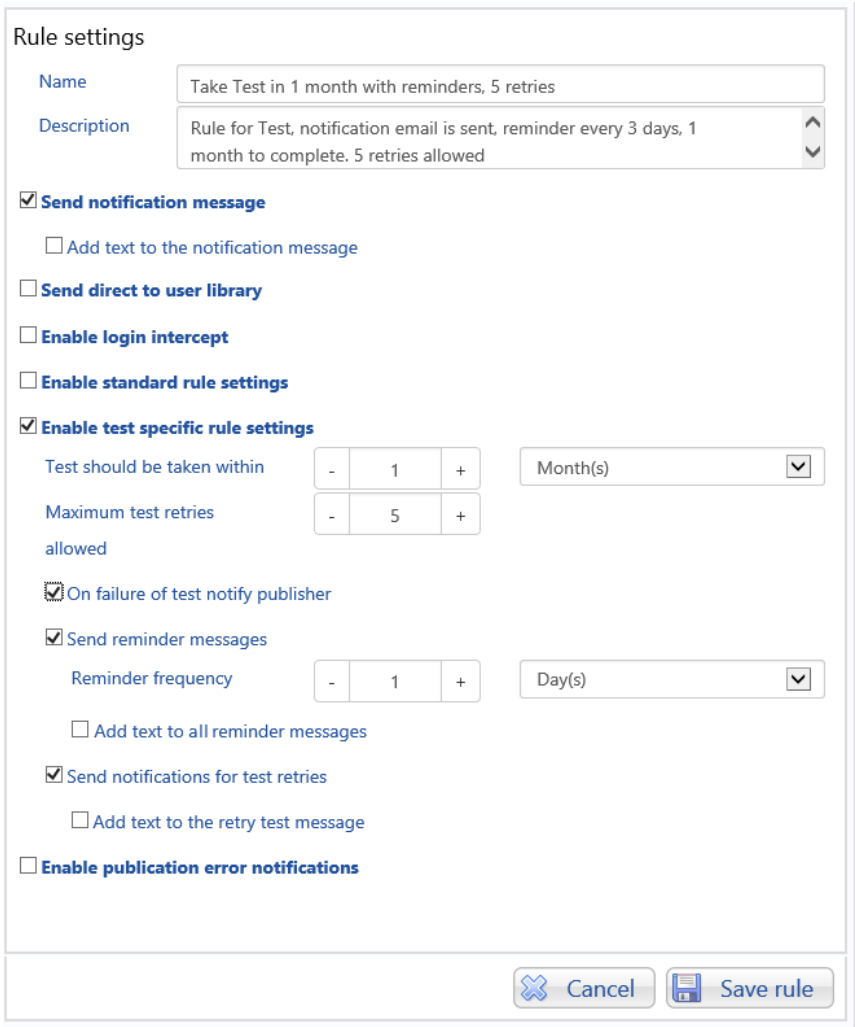
This example shows how to create a rule to be used when Publishing a Test. It gives the Recipients 1 month to complete the Test(s) in the Publication and sends them a reminder every 3 days if they have not yet completed the Publication.

1. Select *Rules*, and click the *Create new rule* button.



2. Enter a *Name* (for example, *Take Test in 1 month with reminders, 5 retries*) and a *Description* (for example, *Rule for Tests, notification email is sent, reminder every 3 days, 1 month to complete. 5 retries allowed.*) for the rule.
3. In this example, notifications emails are sent to the recipients telling them they have a new Publication in their Inbox. Therefore, ensure the option *Send notification message* is *selected*. In this example, no extra text will be added to the notification email so ensure the option *Add text to the notification message* is *cleared*. See "Send Escalating Reminder Messages" on page 73 to send Tests with an escalating reminder message.
4. This rule is *not* a Login Intercept rule, so ensure *Enable login intercept* is *cleared*.
5. This rule *cannot* be used with Documents and Questionnaires so ensure *Enable standard rule settings* is *cleared*.
6. This rule is to be used with Tests, so ensure *Enable test specific rule settings* is *selected*.
7. This rule will give each recipient 1 month to pass the Test(s). First, click on *Unlimited*, and select *Month(s)* from the drop-down list. Next, enter 1 in the *Test should be taken within* text box.

8. Tests sent with this rule will allow the User to have up to five retries after the first attempt (six attempts in all). Enter 5 in the *Maximum test retries allowed* box.
9. For this rule, if a recipient fails all the Test attempts, they will be logged as non-complied and the Publisher will be notified (via an email message). Therefore, ensure the option *On failure of test notify publisher* is *selected*.
10. This rule will send a reminder message to all recipients who have not yet completed all the items in the Publication. This message will be sent every 3 days. Ensure the option *Send reminder messages* is *selected*. Set the *Reminder frequency* to *3 Day(s)*.
11. In this example, no extra text will be added to the reminder email so ensure the option *Add text to all reminder messages* is *cleared*.
12. When a recipient fails a Test and has retries remaining, they will receive an email notifying them they can re-take the Test. Ensure *Send notifications for test retries* is *selected*.
13. In this example, no extra text will be added to the notification email for Test retries so ensure the option *Add text to the retry test message* is *cleared*.



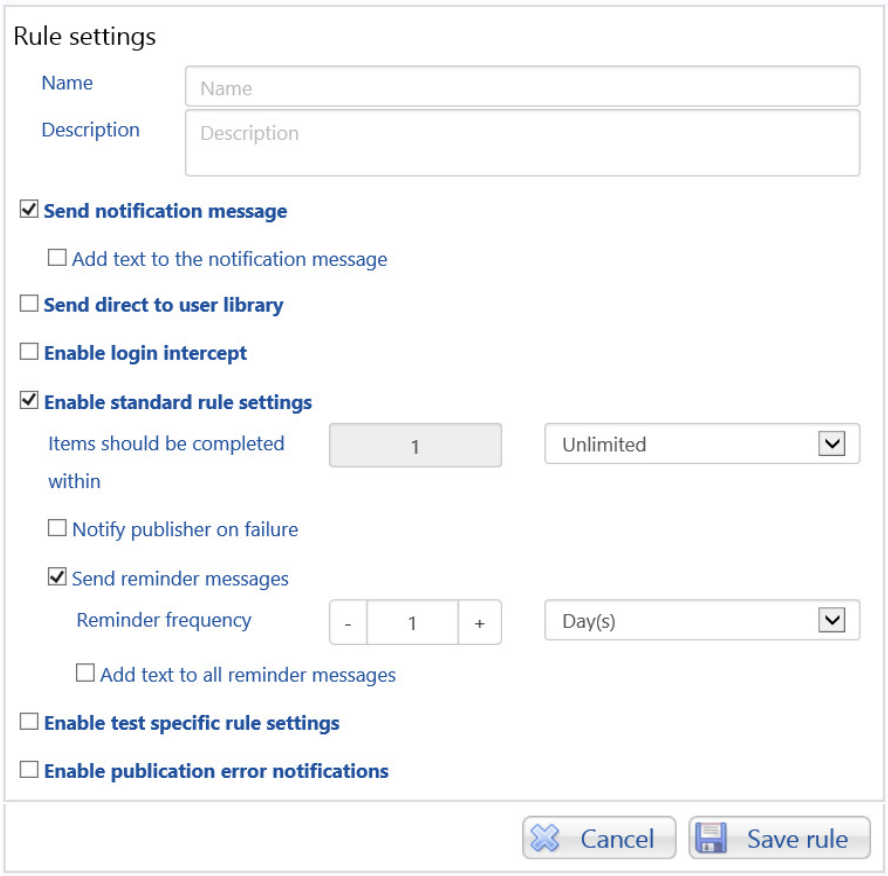
14. The option *Enable publication error notifications* is used to define who should be notified if the Publication goes to Error state. It is not used in this example. Click *Save rule* to save the new rule for Tests.

Note: A Test cannot be sent with the *Send direct to user library* rule.

8.3. Creating A Rule For Both Documents And Tests

You can send a Publication which contains both a Document and a Test. In this example, the Document must be confirmed as read before the Test can be taken. The Test is used to verify the recipients have understood everything in the Document. This example shows how to create a rule which has both Standard and Test settings defined.

1. Select *Rules*, and click the *Create new rule* button.



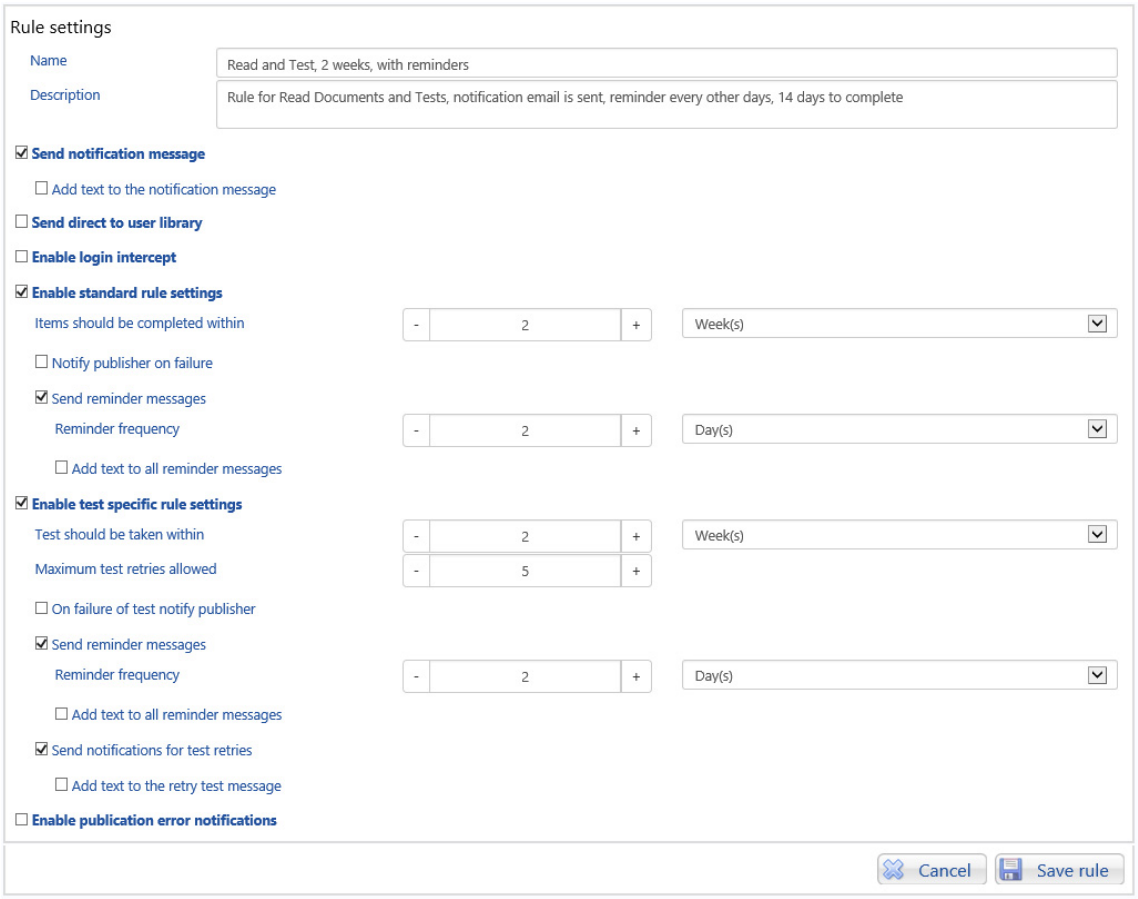
2. Enter a *Name* (for example, *Read and Test, 2 weeks, with reminders*) and a *Description* (for example, *Rule for Read Documents and Tests, notification email is sent, reminder every other days, 14 days to complete*) for the rule.
3. In this example, notifications emails are sent to the recipients telling them they have a new Publication in their Inbox. Therefore, ensure the option *Send notification message* is *selected*. In this example, no extra text will be added to the notification email so ensure the option *Add text to the notification message* is *cleared*.
4. This rule is *not* a Login Intercept rule, so ensure *Enable login intercept* is *cleared*.
5. Documents are sent using the standard rule settings so ensure *Enable standard rule settings* is *selected*.
6. This rule will give each recipient 2 weeks to confirm Documents as read. First, click on *Unlimited*, and select *Week(s)* from the drop-down list. Next, enter 2 in the *Items should be completed within* text box. (You will not be able to change the number until *Unlimited* has been changed to *Day(s)*, *Week(s)*, *Month(s)* or *Year(s)*.)
7. For this rule, if a recipient does not confirm a Document as read within 2 weeks, they will be marked as non-complied, but the Publisher will not be notified. Therefore, ensure the option *Notify publisher on failure* is *cleared*.

8. This rule will send a reminder message to all recipients who have not yet completed all the items in the Publication. This message will be sent every other day. Ensure the option *Send reminder messages* is *selected*. Set the *Reminder frequency* to *2 Day(s)*.
9. In this example, no extra text will be added to the reminder email so ensure the option *Add text to all reminder messages* is *cleared*.
10. This rule is to be used with Tests, so ensure *Enable test specific rule settings* is *selected*.
11. This rule will give each recipient 2 weeks to pass the Test(s). First, click on *Unlimited*, and select *Week(s)* from the drop-down list. Next, enter 2 in the *Test should be taken within* text box.

Note: When a Document is Published with a Test, the Document must be read before the Test can be taken. Therefore, when creating a rule with both Standard and Test settings enabled, make sure the *Test should be taken within* setting is not less than the equivalent setting for the Read document. A Document with a Test cannot be sent with the *Send direct to user library* option *selected*.

12. Tests sent with this rule will allow the User to have up to five retries after the first attempt (six attempts in all). Enter 5 in the *Maximum test retries allowed* box.
13. For this rule, if a recipient fails all the Test attempts, they will be marked as non-complied but the Publisher will not be notified. Therefore, ensure the option *On failure of test notify publisher* is *cleared*.
14. This rule will send a reminder message to all recipients who have not yet completed all the items in the Publication. This message will be sent every 2 days. Ensure the option *Send reminder messages* is *selected*. Set the *Reminder frequency* to *2 Day(s)*.
15. In this example, no extra text will be added to the reminder email so ensure the option *Add text to all reminder messages* is *cleared*.
16. When a recipient fails a Test and has retries remaining, they will receive an email notifying them they can re-take the Test. Ensure *Send notifications for test retries* is *selected*.

17. In this example, no extra text will be added to the notification email for Test retries so ensure the option *Add text to the retry test message* is *cleared.*



18. The option *Enable publication error notifications* is used to define who should be notified if the Publication goes to Error state. It is not used in this example. Click *Save rule* to save the new rule for Documents and Tests.

8.4. Creating A Login Intercept Rule

Rules can be created to notify the publication recipients via email, *Login Intercept* or via both. *Login Intercept* is initiated when a User logs in to their Windows session. A PolicyHub rules manager can create rules for *Login Intercept* which determine if:

- the publication must be completed immediately or after the publication due date
- *Login Intercept* starts immediately or after the publication due date
- the User can defer for a number of days or for a number of logins after the publication due date.

When a User logs in to their Windows session, if they have any outstanding publications to complete, PolicyHub is started and the User's Inbox is presented. If the publication presented has deferrals available, the User may defer the publication. However, if there are no deferrals available, the User must complete the presented publication before they are allowed to exit PolicyHub. If the User attempts to quit PolicyHub while there is a publication to be acted upon (with no deferrals available), PolicyHub will immediately restart. The User will only be allowed to continue with the Windows session once the publication has been completed.

This example shows how to create a Login Intercept rule which will start Login Intercept as soon as the Publication is sent, the recipients will be able to start using deferrals once the

Publication due date has passed, and they will be allowed to defer completing the Publication for 3 logins. Once all three deferrals have been used, any Users who have not completed all the items in the Publication will not be allowed to log in to Windows until they have completed the outstanding items in the Publication.

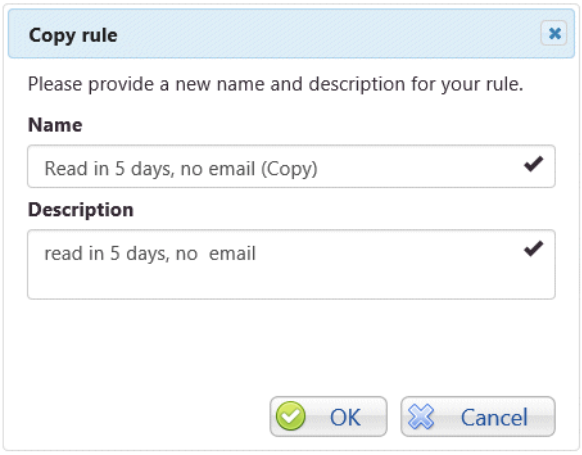
1. Select *Enable login intercept*. The Login Intercept options are displayed.
2. In this example, the recipients will be given 3 deferrals after the publication due date. Ensure *After publication due date* is *selected* for *User must complete documents*.
3. Login intercept will start as soon as the Publication is sent. Therefore, ensure *Login intercept will start* is set to *Immediately*.
4. Set *Items should be completed within* to *3 Login(s)*. Once the *Publication due date* has passed, the User will be allowed to defer completing the Publication items for three Windows logins. Once they have used up their three deferrals, they will be unable to progress to their Windows login until they have completed the items in the Publication.

Note: If a recipient logs in to Windows multiple times in one day, only one login will be deducted from the available deferrals.

5. This completes the Login Intercept rule settings. However, the rule needs to be completed by adding Standard and/or Test rule settings. See "Creating A Rule For Documents" on page 71, "Creating A Rule For Tests" on page 76 and "Creating A Rule For Both Documents And Tests" on page 78 for examples.

8.5. Copying A Rule

1. On the *Rules Management* page right-click on the rule you want to copy to display the rules menu and select *Copy rule*. The *Copy rule* dialog is displayed.



2. The copied rule is given the same name as the original rule with *(Copy)* appended. The default description is the same as the description on the original rule. Edit the name and the description, as required. Click *OK* to save the new rule or *Cancel* to discard the copy. Edit the rule settings to create the required rule. Click *Save rule* to save the copied rule.

Note: If you click on a different rule or click *Create new rule*, you will discard the entered changes.

Menus, Options and Buttons

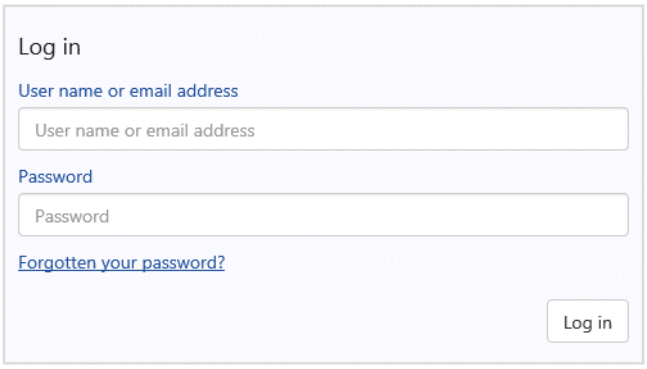
The following chapters provide a description of every menu, configuration option and button in PolicyHub.

9. Logging In

PolicyHub Users will either log in automatically using Windows authentication, or they will use Forms Authentication and enter a user name (or email address) and a password.

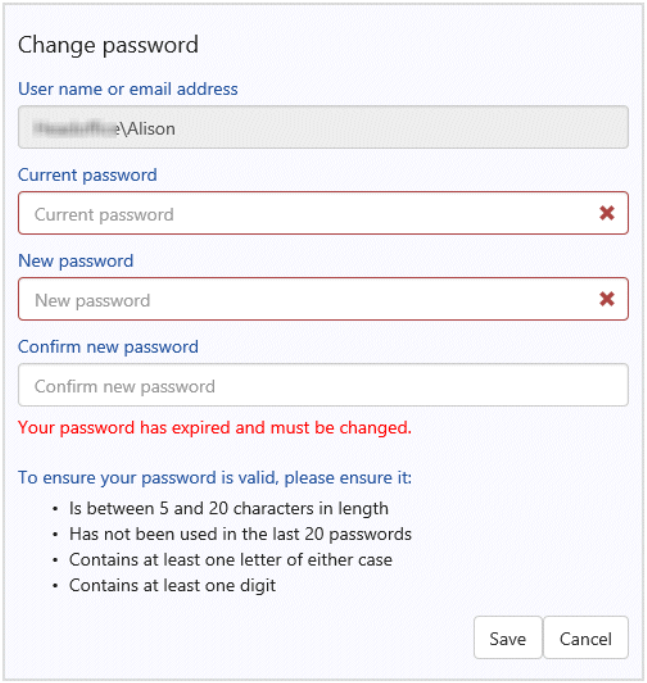
9.1. Log In And Change Password

Some Users may be presented with a log in screen.



Log in to PolicyHub to see the PolicyHub application. (You should have been provided with a user name and a password.)

You may be asked to change your password when, for example, you have been given a temporary password which expires immediately or when you have had a password which has expired after a number of days. When your password has expired, you will be taken to the *Change password* screen.



Note: The information provided under the *Save* and *Cancel* buttons tells you about your password policy. The password policy used by your company may vary from the password policy shown here.

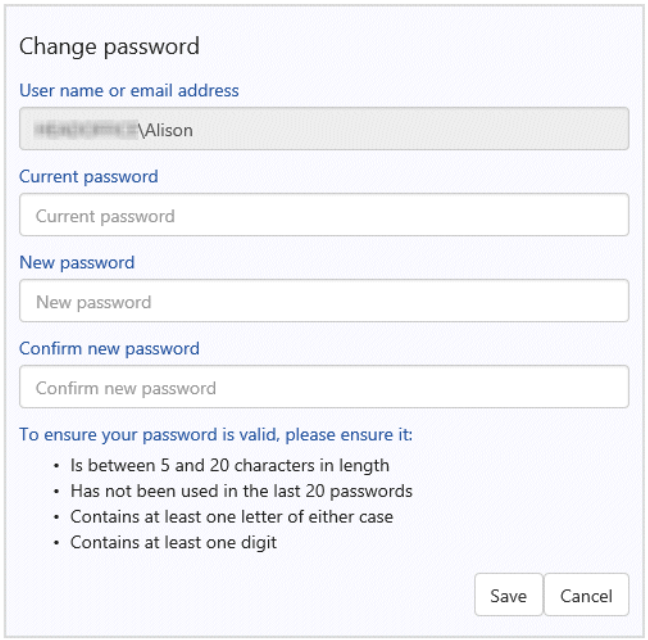
Enter a new password which complies with your company's password policy, enter the same password in the *Confirm new password* box and click *Save* to continue to the PolicyHub application.

9.1.1. Change Password

Some Users can change their PolicyHub password. These Users are given the *Change password* option at the bottom of the PolicyHub application.

Click the *Change password* text to open the *Change Password* screen:

Note: The information provided under the *Confirm new password* text box tells you about your password policy. The password policy used by your company may vary from the password policy shown here.



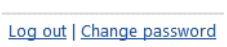
Enter a new password which complies with your company's password policy, enter the same password in the *Confirm new password* box and click *Save* to continue to the PolicyHub application.

9.2. Session Timed Out

Users who have the *Log out* and *Change password* options at the bottom of the PolicyHub application may have to log in to the PolicyHub application after they have leave PolicyHub idle for several minutes. When this occurs, simply enter the requested information on the Login screen and proceed to the PolicyHub application.

9.3. Log Out

Some Users are given the option to *Log out* of the PolicyHub application. These Users are given the *Log out* option at the bottom of the PolicyHub application.



Click the *Log out* text to end your PolicyHub session. The current PolicyHub session is ended and the Login screen is displayed.

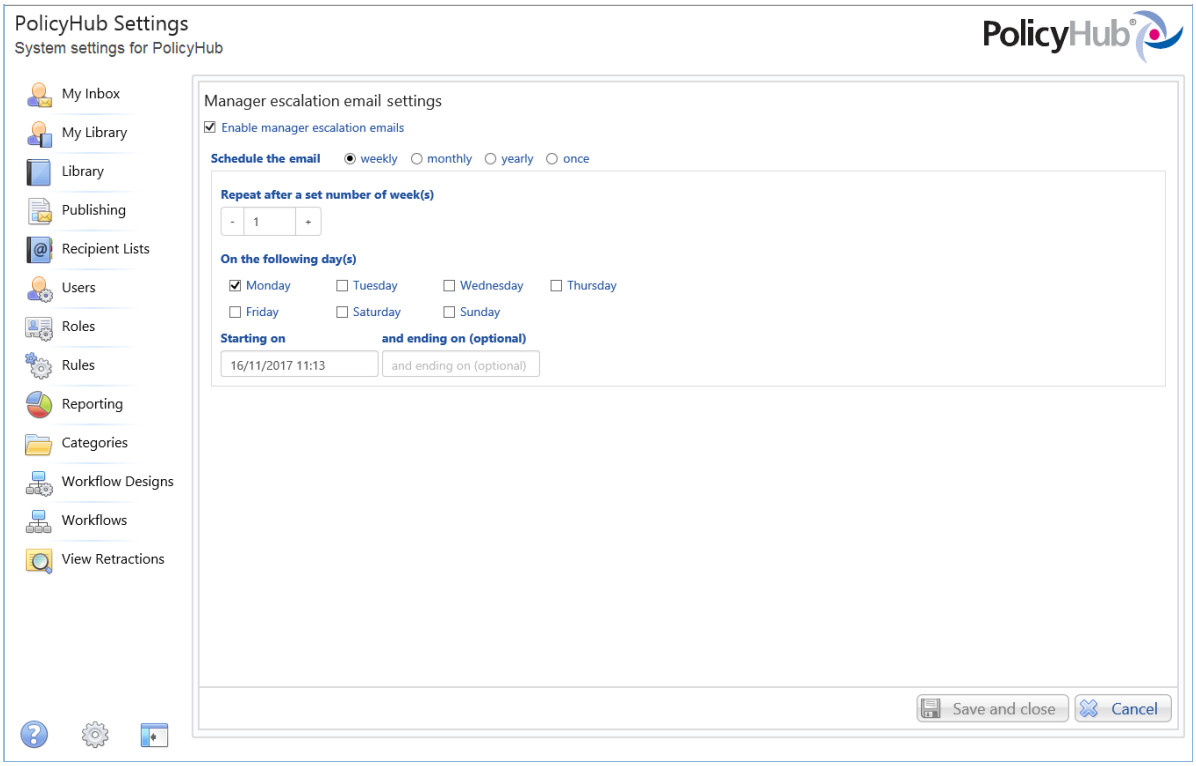
Note: Alternatively, Users can simply close the PolicyHub browser window to end the current PolicyHub session.

10. System Settings

Note: Depending on your PolicyHub licence, *System Settings* may not be visible in your application software.

To view, or change PolicyHub's *System Settings*, click the *Settings* icon on the bottom left of any page.

When you select the *Settings* icon the *Manager escalation email settings* page opens.



10.1. Enable Manager Escalation Emails

With the *Enable manager escalation emails* check box selected, manager escalation emails will be sent to recipients at the planned intervals described in "Manager Escalation Email Schedule" below.

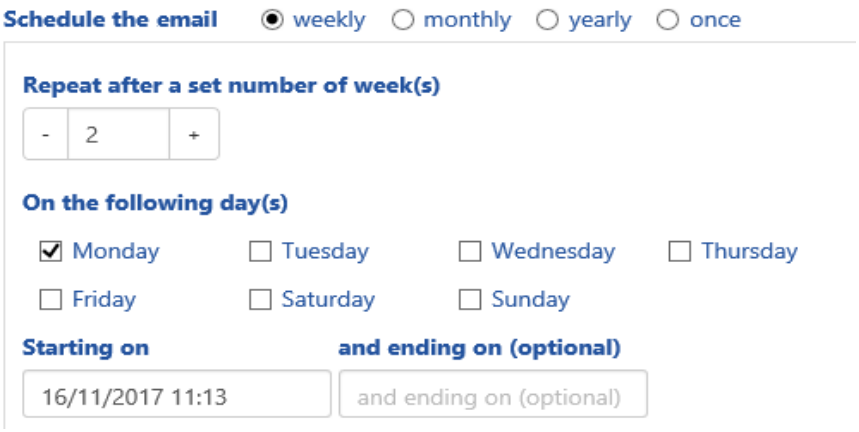
When the *Enable manager escalation emails* check box is clear, email messages will not be sent. See "Escalation emails" on page 241 for further information.

10.1.1. Manager Escalation Email Schedule

In the *Schedule the email* section, select the interval at which the *Manager Escalation Email* will be sent. The choices are *weekly, monthly, yearly or once* and the default setting is *weekly.*

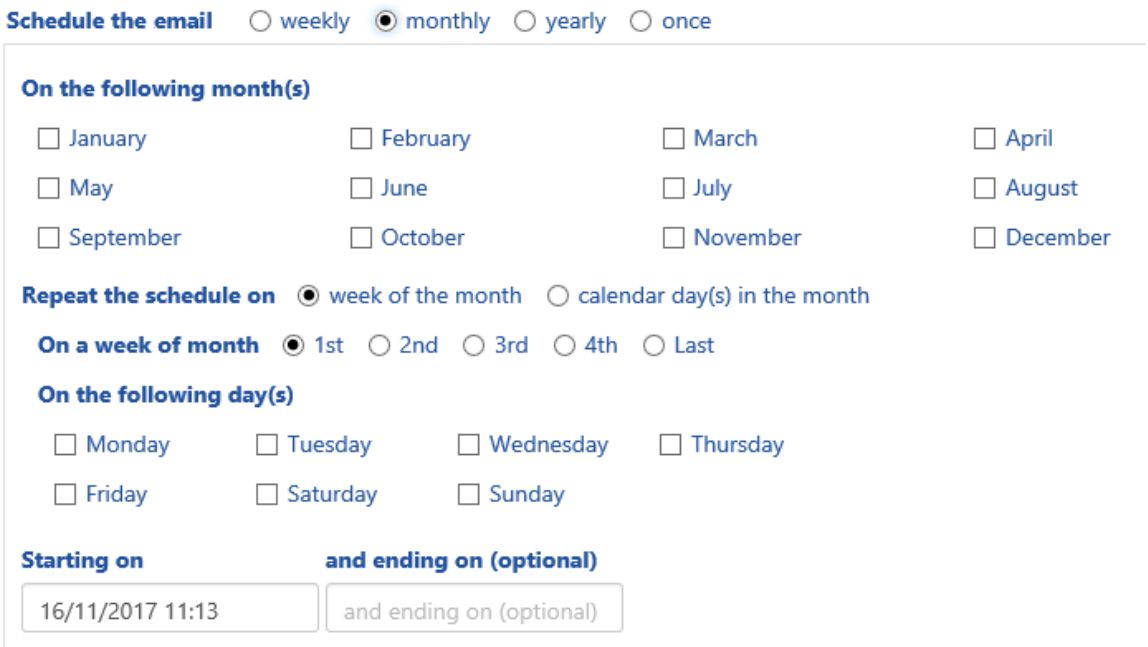
When *weekly* is selected, you can set a value for *Repeat after a set number of week(s)* and you can select the days of the week you want the reminder to be sent. For example, to send a

Manager Escalation Email every other Monday, set *Repeat after a set number of week(s)* to *2* and select Monday.



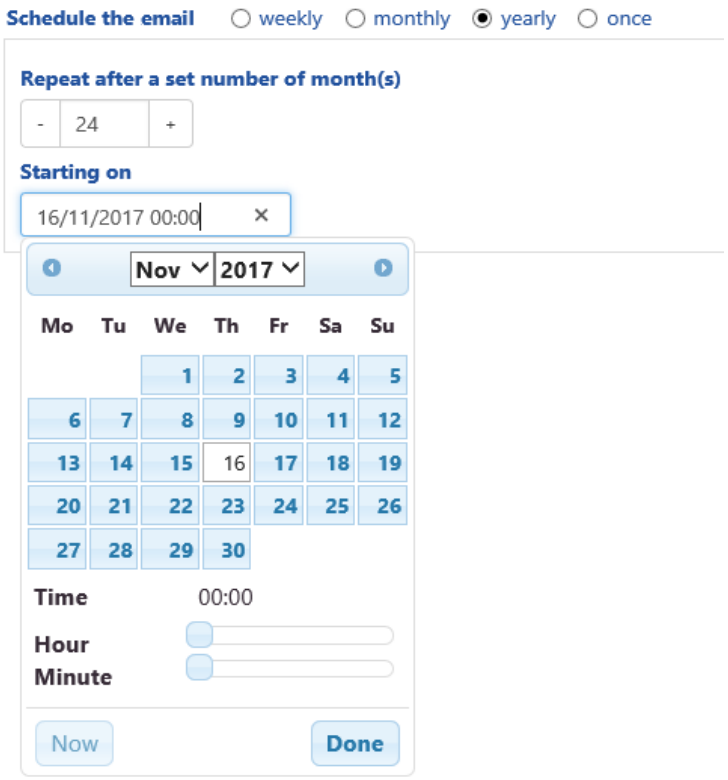
When *monthly* is selected, you can select the months you want the review reminder to be sent out. The review reminder can then be sent out on specified weeks of the month, or on specified calendar days of the month.

When *week of the month* is selected, the *Manager Escalation Email* can be sent out on the *1st, 2nd, 3rd 4th* or *Last* week of the month on the specified days of the week. When *calendar day(s) in the month* is selected, one or more calendar days can be entered in the text box. A comma must be used to separate multiple values.



When *yearly* is selected, click in the *Starting on* box to open a calendar. Select the date and the time required.

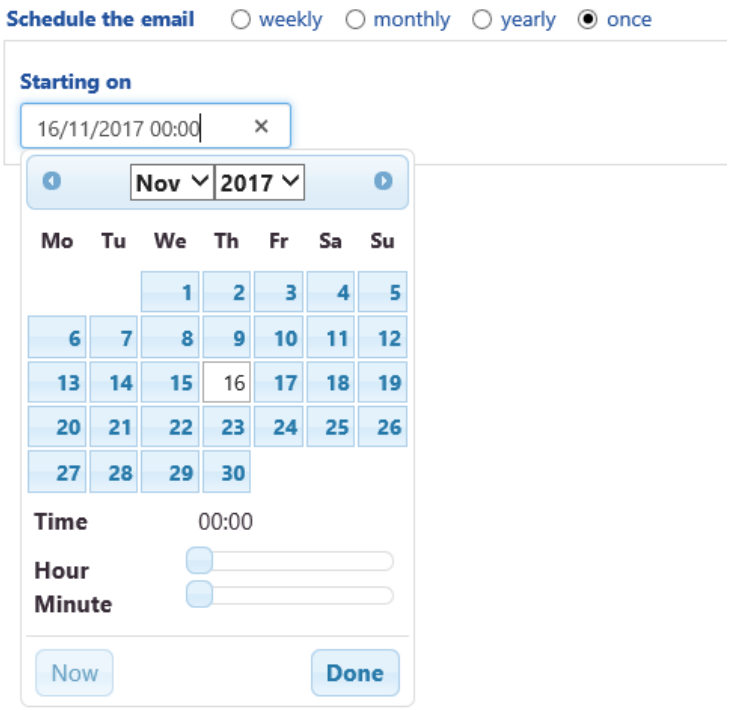
You can set the email frequency in the *Repeat after a set number of month(s)* field. In the example below the email will be sent 2 years (24 months) after the *Starting on* date and time at midnight on the 16th November 2019.



Click *Done* when you have configured the required date and time for the email repetition.

Weekly, monthly or yearly emails can be left to run indefinitely, or you can configure an end date for the schedule. To set an end date, click in the *and ending on (optional)* text box and select a date from the pop-up calendar. Click *Done* when you have selected the required date. The schedule ends at the end of the selected day.

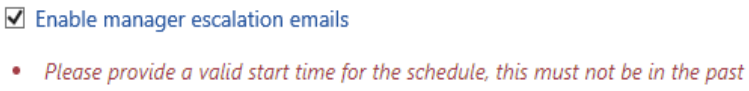
When *once* is selected, click in the *Starting on* box to open a calendar. Select the date and the time.



Click *Done* when you have configured the required date and time.

10.1.1.1. Save And Close

Click *Save and close* to save the changes made in the *Manager escalation email settings* page. If there are any errors which prevent the settings being saved, these errors must be resolved before you can save the settings. A validation error describing the fault will also be displayed.

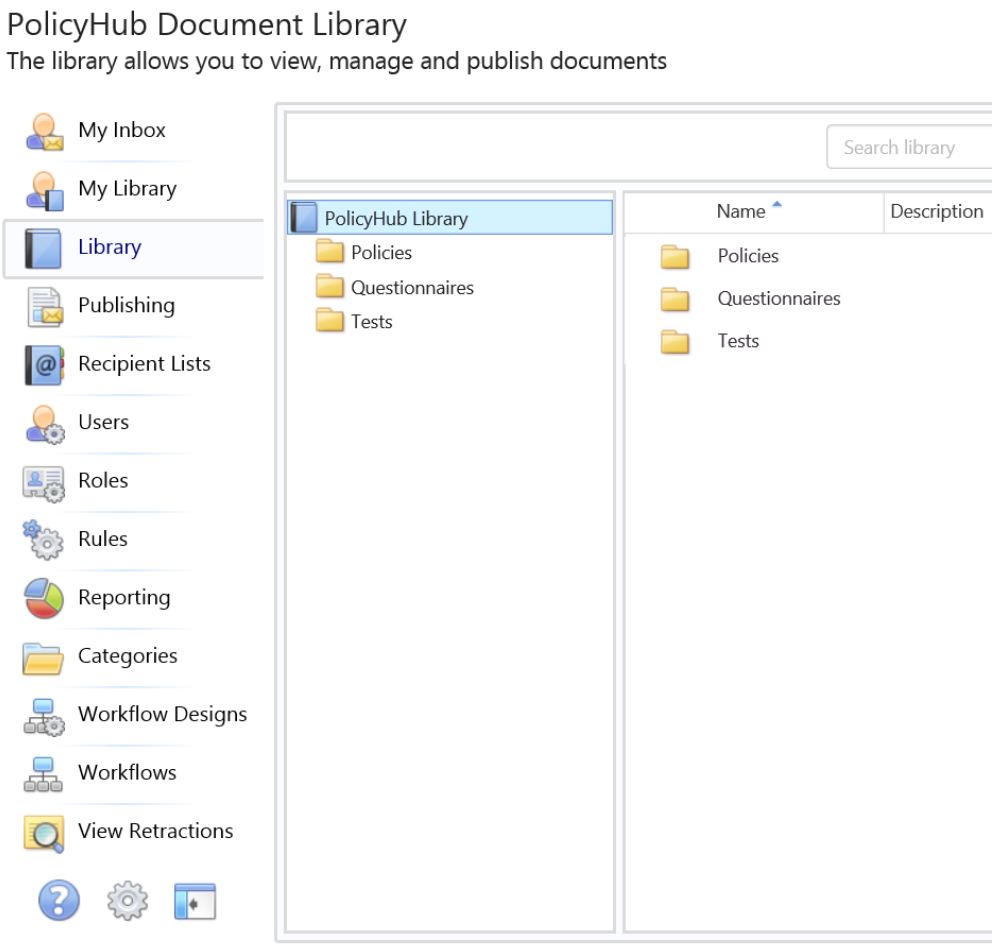


10.1.1.2. Cancel

Click *Cancel* to close the *Manager escalation email settings* page and return to the original PolicyHub window. Any selections you have made will be lost when selecting *Cancel.*

11. Library

The library is used to store MS Office and PDF Policy documents, Tests and Questionnaires. These documents can be organised in folders, as required.

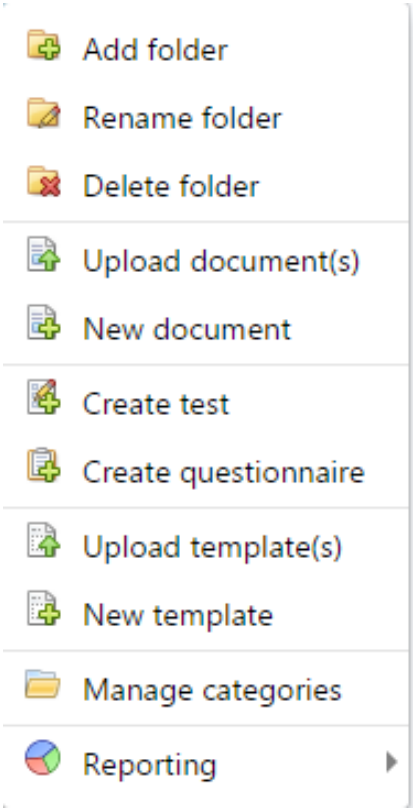


11.1. Folder View Options

The folder view options are those options which are available from the left-hand side pane.

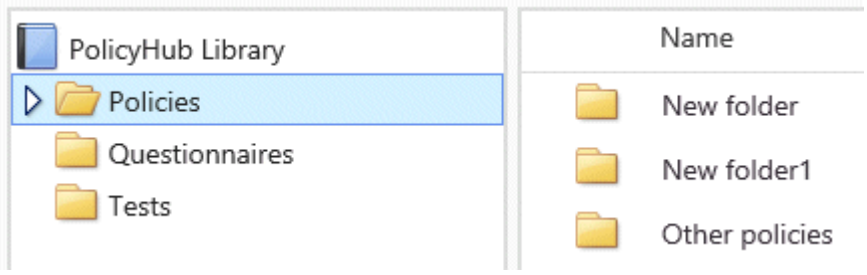
11.1.1. Folder Menu

Folders are used to organise Documents, Templates, Tests and Questionnaires. The folder menu is displayed when you right-click on the PolicyHub library icon or on a folder.



11.1.1.1. Add Folder

Select *Add folder* from the menu. A new folder named *New folder* is added as a sub-folder of the currently selected folder. The new folder is displayed in the pane on the right. When two or more folders are added, the second and subsequent new folders are numbered.



11.1.1.2. Rename Folder

Select *Rename folder* from the menu. Type the new name and press *Enter*.

Note: It is not possible to use any of the following characters in a folder name:
< > ? * \ / |"

11.1.1.3. Delete Folder

Select *Delete folder* from the menu. Confirm you want to delete the folder by clicking *Yes*. Cancel the deletion by clicking *No*.

Note: A folder which contains a Published document, Test or Questionnaire cannot be deleted.

11.1.1.4. Upload Document(s)

Select *Upload document(s)* to add a document in the selected folder. See "Uploading A Document To The Library" on page 9 for an example which shows how to add a document.

Note: When an enforced template is assigned to the selected folder (via "Categories") the *Upload Document(s)* menu selection is not available.

11.1.1.5. New Document

Select *New document* to create a new document in the selected folder. See "Create A New Document In The Library" on page 9 for an example which shows how to create a new document.

11.1.1.6. Create Test

Select *Create test* to create a new Test in the selected folder. See "Tests" on page 221 for more information on the menus and options for Tests. See "Test Configuration Examples" on page 39 for examples which show how to create Tests.

11.1.1.7. Create Questionnaire

Select *Create questionnaire* to create a new Questionnaire in the selected folder. See "Questionnaires" on page 199 for more information on the menus and options for Questionnaires. See "Questionnaire Configuration Examples" on page 27 for examples which show how to create Questionnaires.

11.1.1.8. Upload Template(s)

Select *Upload template(s)* to add a template in the selected folder. See "Uploading A Template To The Library" on page 10 for an example which shows how to add a template.

11.1.1.9. New Template

A template is a document type that creates a copy of itself when you open it. You can create a template as a .doc;.docx;.dot;.dotx;.docm;.dotm;.doc;.docx type (a .dotm file type allows you to enable macros in the file).

Select *New template* to create a new template in the selected folder. See "Create A New Template In the Library" on page 11 for an example which shows how to create a new template.

11.1.1.10. Manage Categories

Note: Categories are available depending on your PolicyHub system licence.

Categories control which Workflows are allowed for a set of documents. Categories are also linked to documents, similarly active Workflows are also linked to documents. You can control the Category assigned to a Workflow or set of documents using the *Manage categories* menu.

By managing Categories you are able to change the Workflow design and the Re-review Workflow design assigned to a folder or set of documents.

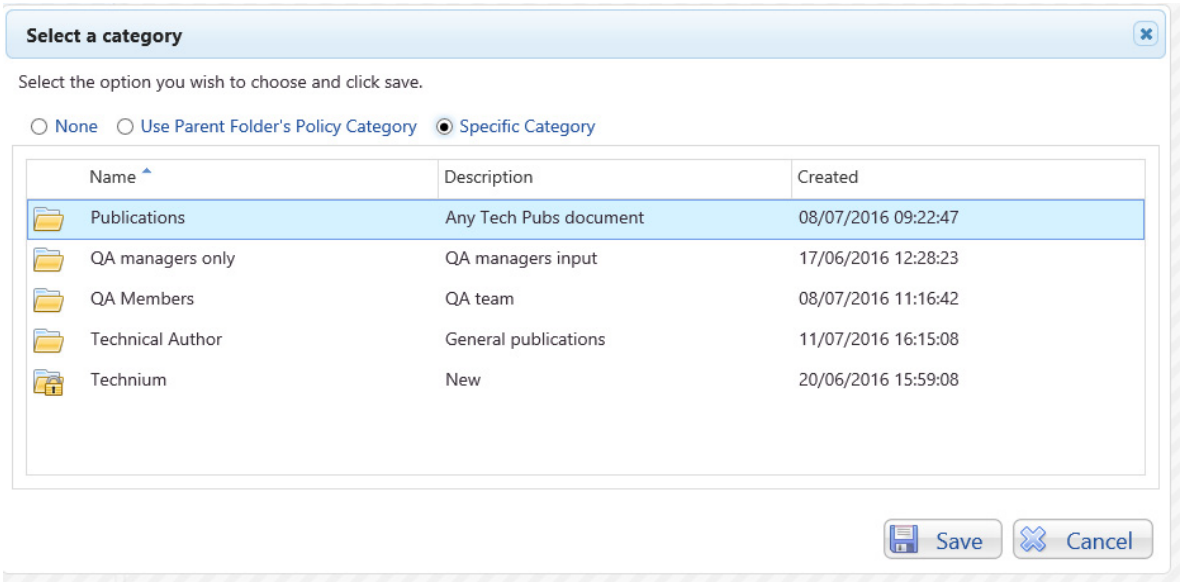
Categories also define whether a template is to be configured and enforced for a document. This allows an administrator to specify if all documents within a specific category will use the same template. Refer to "Categories" for information how to select a template for a category.

See "Moving A Library Item With Assigned Categories" on page 134 and "Categories" on page 388 for the implications associated with changing an assigned owner or location of a Category.

Note: You can only override a Category for a policy if *Assign policy categories* rights are enabled, see "Roles" for further information.

Select the folder or document you want to manage and right click on *Manage categories*.

The following *Select a category* menu appears.



If selecting a folder you can choose from three Category options:

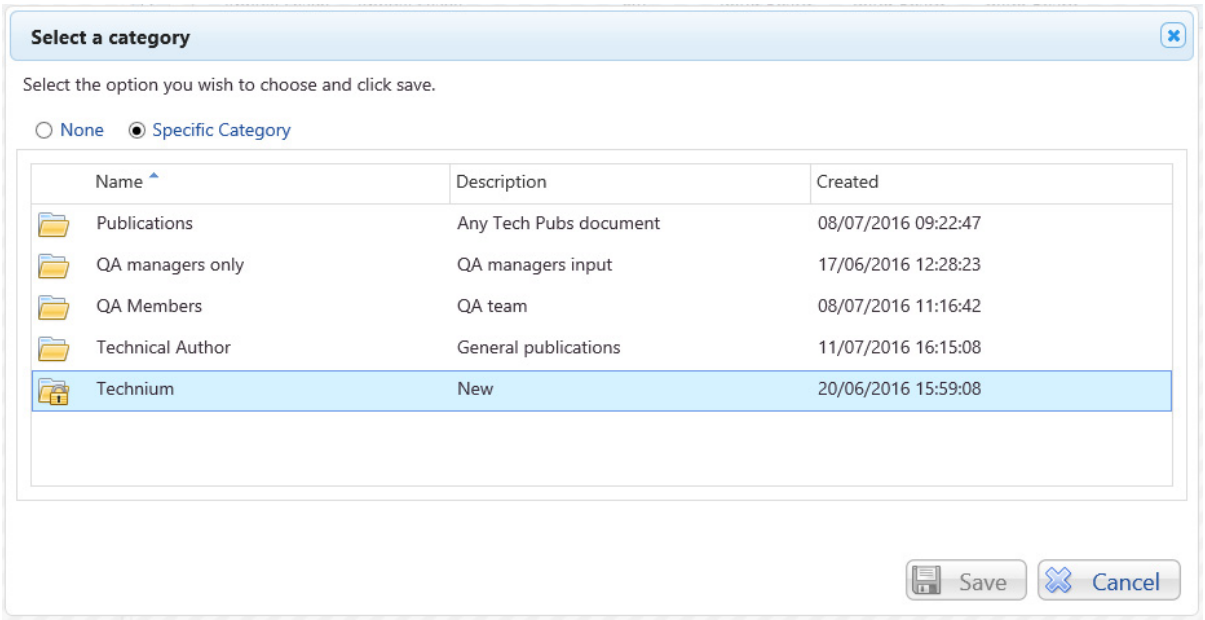
- *None* - this will remove the Category from any future documents added to the folder. Any documents already in the folder will retain the Category they were previously assigned.

- *Use Parent Folder's Policy Category* - providing the folder you wish to change has a parent folder you can change its Category to that of the parent folder selecting this option. If the folder does not have a parent you are unable to save this selection.

Note: This option is not available in the library root folder.

- *Specific Category* - allows you to choose another Category for the folder.

If selecting a document you can choose from two Category options:



- *None* - this will remove the Category from any future documents published using this Workflow.
- *Specific Category* - allows you to choose another Category for the folder.

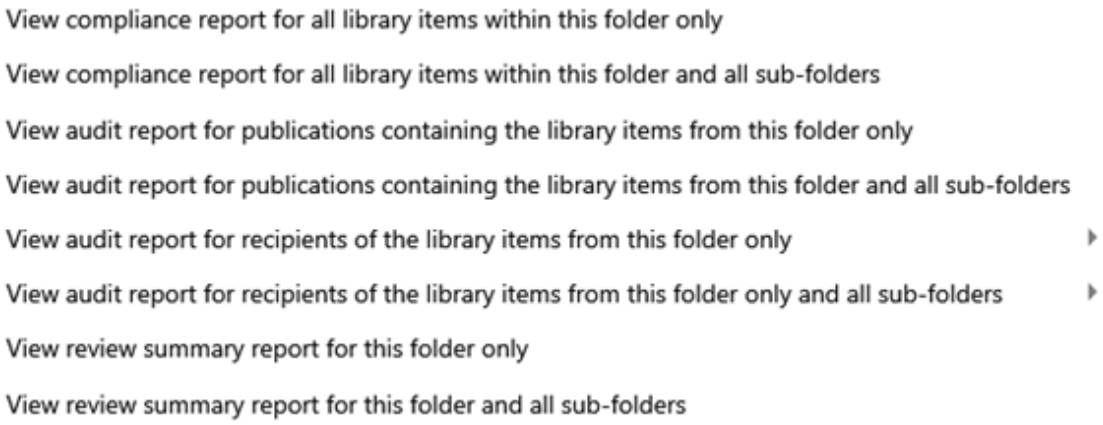
Note: The *Manage categories* option is not available for policies that have an *In Review* status.

11.1.1.11. Reporting

In the PolicyHub library, you can investigate compliance reports and audit reports for all the items in a selected folder.

Right-click on a folder in the PolicyHub library and select *Reporting*.

The following menu is displayed.

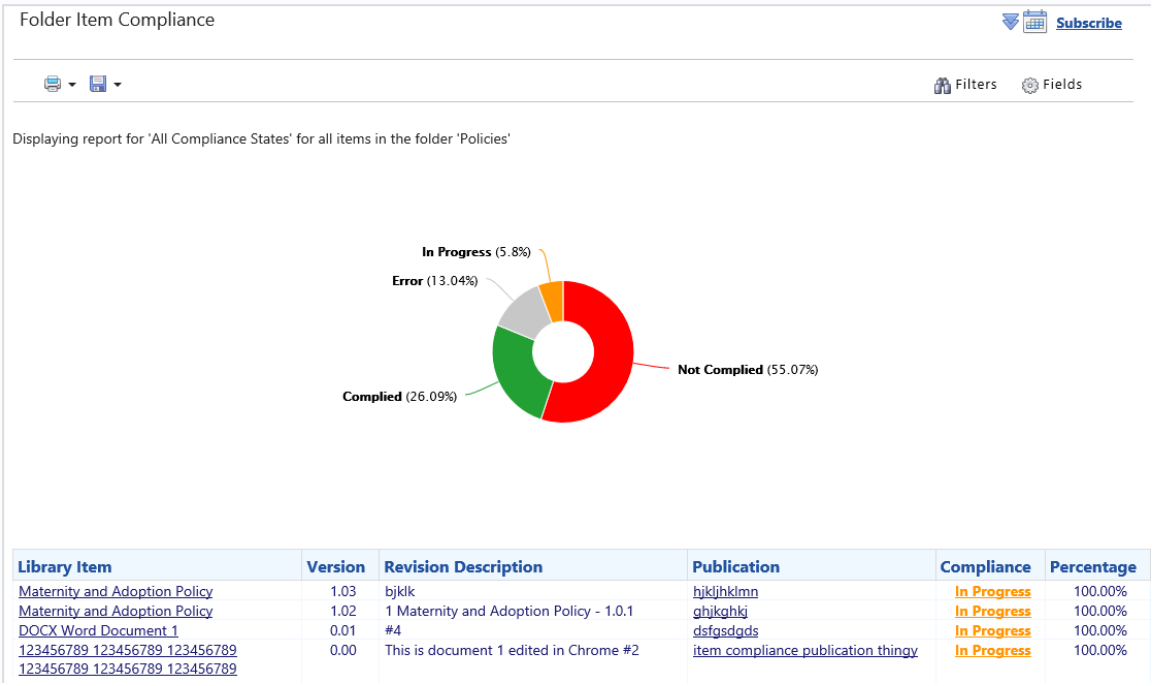


When selected, each menu item will generate a report.

To investigate in more detail, click on any of the active links (underlined text) in the report.

Note: A report toolbar is displayed on each report. See “Report Toolbar” on page 363 for a description of the toolbar.
Each report includes a *Filters* tab which displays or hides filters which can be used to refine the report. For more information about adding and or changing filtering options, see “Date Filters” on page 371, “Additional Filtering Options” on page 372 and “Changing the Default Filtering Option” on page 373.
Each report also has the capability to sort data within each column. For more information See “Sorting Report Data Within Columns” on page 376.
The reports also include a *Fields* tab which displays or hides fields which can also be used to refine the report. For more information see “Adding/Removing Columns From Reports” on page 376. Large reports contain a tool bar to navigate between report pages. For more information See “Report Pagination” on page 377.
The *Subscribe* button enables the User to create a report subscription. For more information see “Creating Subscriptions” on page 380.

11.1.1.12. View Compliance Report For All Library Items Within This Folder Only



When the report data is found, compliance statistics for all the items in the chosen folder are displayed in the main report window.

The column headings in the above report are described in Table 1.

TABLE 1. Folder Item Compliance Report

Item	Description
Library Item	The name of a library item (Document, Questionnaire or Test) located in the selected folder. Active Link. Click a Library Item Name to see the *Item Compliance* report for all the Compliance states for all Publications which include the selected Library Item. See "Reporting" on page 113 for more information.
Version	The version of the library item.
Revision Description	The description entered when this version was saved.
Publication	The name of the Publication with which this version of the library item was published. Active Link. Click a Publication name to display the *Item Compliance* report for the selected Publication and the selected Compliance Status. See "Reporting" on page 113 for more information.
Compliance	The compliance status (Complied, In Progress, Not Complied or in Error) of the library item for the selected Publication. Active Link. When the Compliance Status is clicked, the *User Action* report is displayed for the selected Compliance status of the selected Publication. See "User Action Report" on page 270 for more information.

TABLE 1. Folder Item Compliance Report

Item	Description
Percentage	The percentage of recipients of the Publication with the compliance status shown.
Publication Status (Hidden by default)	Publications have the status *Completed* when: • They have been complied with by all recipients. • The rule used for Publication has expired. • They were Published directly into user library. Publications are *Active* when there are still some outstanding publications to be complied with and the rule has not expired. Publications have the status *Error* when they weren't sent because of an error. Publications have the status *Retracted* when the Publication was *Retracted*. Publications have the status *Recalled* when the Publication was *Recalled*.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click the report's *Close* button to return to the library.

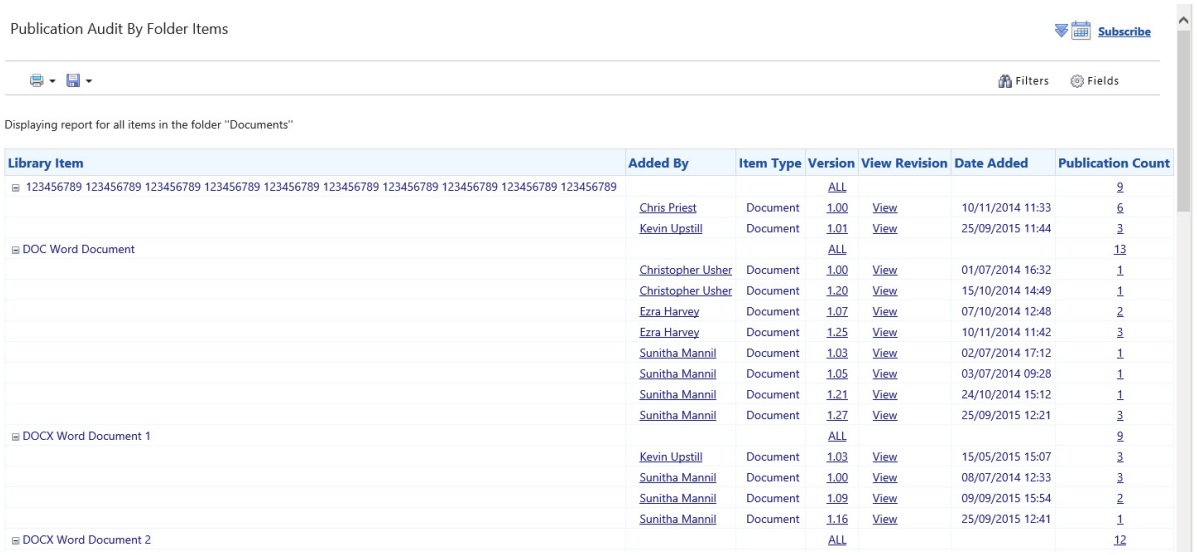
11.1.1.13. View Compliance Report For All Library Items Within This Folder And All Sub-Folders

This report contains the same data as the report described above. However, if the current folder contains sub-folders, the report also includes the information on the library items in the sub-folders.

See "Folder Item Compliance Report" on page 99 for information on the items displayed.

11.1.1.14. View Audit Report For Publications Containing The Library Items From This Folder Only

When the report data is found, audit information for all the Publications containing items in the chosen folder is displayed in the main report window.


Publication Audit By Folder Items

Subscribe

Filters Fields

Displaying report for all items in the folder "Documents"

Library Item	Added By	Item Type	Version	View Revision	Date Added	Publication Count
123456789 123456789 123456789 123456789 123456789 123456789 123456789 123456789 123456789 123456789			ALL			9
	Chris Priest	Document	1.00	View	10/11/2014 11:33	6
	Kevin Upstill	Document	1.01	View	25/09/2015 11:44	3
DOC Word Document			ALL			13
	Christopher Usher	Document	1.00	View	01/07/2014 16:32	1
	Christopher Usher	Document	1.20	View	15/10/2014 14:49	1
	Ezra Harvey	Document	1.07	View	07/10/2014 12:48	2
	Ezra Harvey	Document	1.25	View	10/11/2014 11:42	3
	Sunitha Mannil	Document	1.03	View	02/07/2014 17:12	1
	Sunitha Mannil	Document	1.05	View	03/07/2014 09:28	1
	Sunitha Mannil	Document	1.21	View	24/10/2014 15:12	1
	Sunitha Mannil	Document	1.27	View	25/09/2015 12:21	3
DOCX Word Document 1			ALL			9
	Kevin Upstill	Document	1.03	View	15/05/2015 15:07	3
	Sunitha Mannil	Document	1.00	View	08/07/2014 12:33	3
	Sunitha Mannil	Document	1.09	View	09/09/2015 15:54	2
	Sunitha Mannil	Document	1.16	View	25/09/2015 12:41	1
DOCX Word Document 2			ALL			12

The column headings in the above report are described in Table 2.

TABLE 2. Publication Audit By Folder Items Report

Item	Description
Library Item	The name of a document located in the Selected Folder.
Added By	The name of the person who uploaded or edited this version of the Document, Questionnaire or Test. Active Link. Click to open the *User Information* report for the selected user. Report. See "User Information Report" on page 121 for information.
Item Type	Policy Documents have the Item Type *Document*. Questionnaires have the Item Type *Questionnaire*. Tests have the Item Type *Test*.
Version	The version of the document that was edited by the person shown. Active Link. Click the version to see the *Library Item Audit By Publication* report for the selected library item version. See "Library Item Audit By Publication Report" on page 255 for more information.
View Revision	Active Link. Click *View* to view the selected Document revision or *Preview* to preview the selected Test or Questionnaire revision.

TABLE 2. Publication Audit By Folder Items Report

Item	Description
Date Added	The date and time this version of the Document, Questionnaire or Test was uploaded.
Publication Count	The number of times this version of the document was published. Active Link. Click the Publication count to see the *Library Item Audit By Publication* report for the Publications included in the Publication count. See "Library Item Audit By Publication Report" on page 255 for more information.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click the report's *Close* button to return to the library.

11.1.1.15. View Audit Report For Publications Containing The Library Items From This Folder And All Sub-Folders

This report contains the same data as the report described above. However, if the current folder contains sub-folders, the report also includes the information on the library items in the sub-folders.

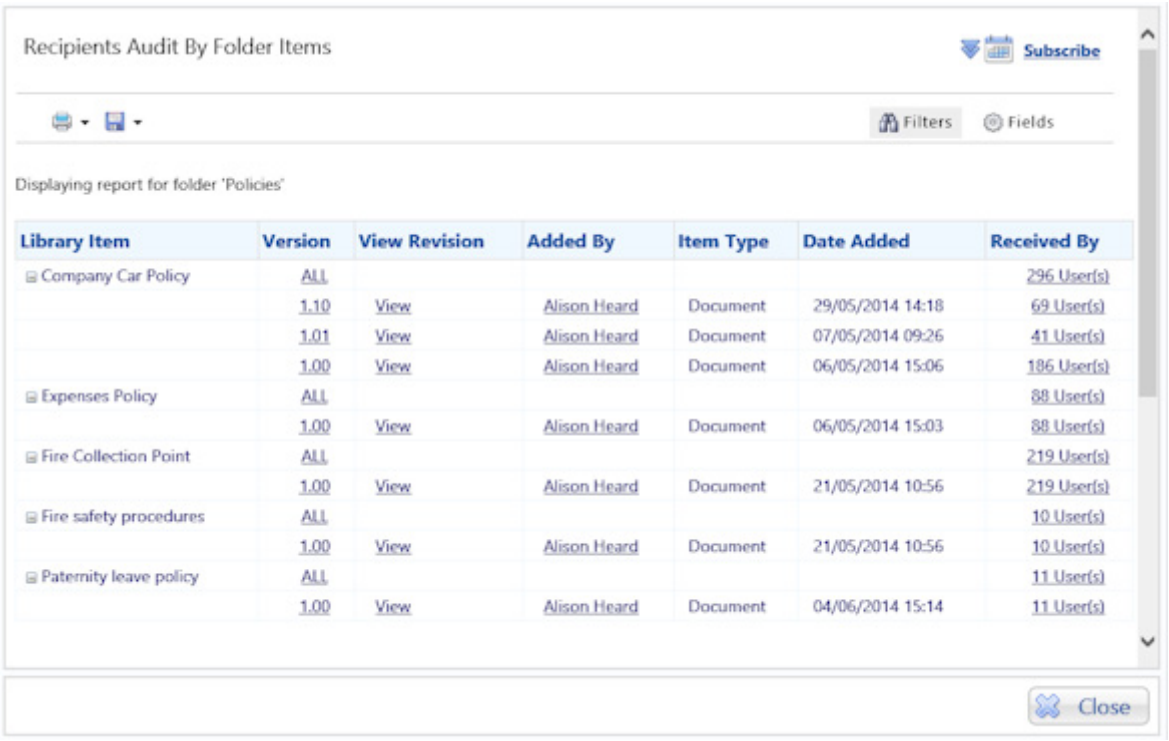
See "Publication Audit By Folder Items Report" on page 101 for information on the items displayed.

11.1.1.16. View Audit Report For Recipients Of The Library Items From this Folder Only

From the selected menu item, select one of the following sub-menu options:

- *Across all dates* – shows the report with no date filter.
- *For a specific date range* – shows the report for items from this folder which were included in Publications which were sent on the days specified only.

This report shows audit information for the recipients of the library items (Documents, Questionnaires, Tests) which are located in the selected Folder.



Library Item	Version	View Revision	Added By	Item Type	Date Added	Received By
Company Car Policy	ALL					296 User(s)
	1.10	View	Alison Heard	Document	29/05/2014 14:18	69 User(s)
	1.01	View	Alison Heard	Document	07/05/2014 09:26	41 User(s)
	1.00	View	Alison Heard	Document	06/05/2014 15:06	186 User(s)
Expenses Policy	ALL					88 User(s)
	1.00	View	Alison Heard	Document	06/05/2014 15:03	88 User(s)
Fire Collection Point	ALL					219 User(s)
	1.00	View	Alison Heard	Document	21/05/2014 10:56	219 User(s)
Fire safety procedures	ALL					10 User(s)
	1.00	View	Alison Heard	Document	21/05/2014 10:56	10 User(s)
Paternity leave policy	ALL					11 User(s)
	1.00	View	Alison Heard	Document	04/06/2014 15:14	11 User(s)

The column headings in the above report are described in Table 3.

TABLE 3. Recipients Audit By Folder Items Report

Item	Description
Library Item	The name of a Document, Questionnaire or Test located in the selected Folder.
Version	The version of the Document, Questionnaire or Test that was edited by the person shown. Active Link. Click on a document Version to display the *Library Item Audit By Recipients* report for the selected document version. See "Library Item Audit By Group Report" on page 318 for more information.
View Revision	Active Link. Click *View* to view the selected Document revision or *Preview* to preview the selected Test or Questionnaire revision.
Added By	The name of the person who uploaded or edited this version of the Document, Questionnaire or Test. Active Link. Click to open the *User Information* report for the selected user. Report. See "User Information Report" on page 121 for information.
Item Type	Policy Documents have the Item Type *Document.* Questionnaires have the Item Type *Questionnaire*. Tests have the Item Type *Test.*

TABLE 3. Recipients Audit By Folder Items Report

Item	Description
Date Added	The date and time this version of the Document, Questionnaire or Test was uploaded.
Received By	The number of recipients of the version of the Document, Questionnaire or Test. Active Link. Click to see the *Library Item Audit By Recipients* report for the selected recipients. See "Library Item Audit By Group Report" on page 318 for more information.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click the report's *Close* button to return to the library.

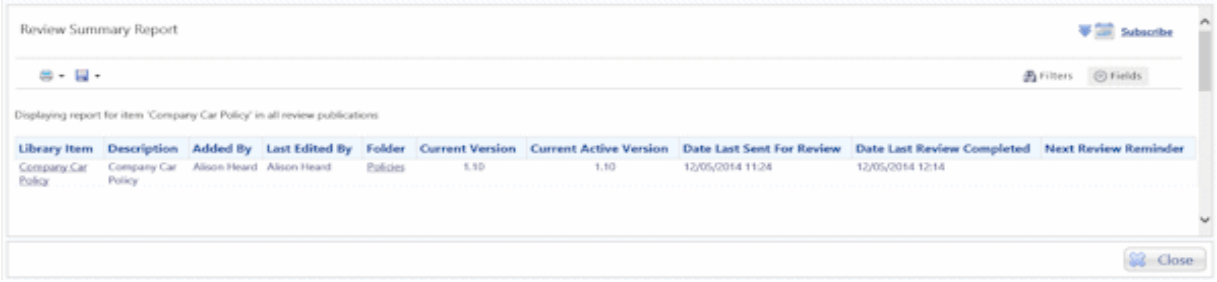
11.1.1.17. View Audit Report For Recipients Of The Library Items From this Folder And All Sub-Folders

This report contains the same data as the report above. However, if the current folder contains sub-folders, the report also includes the information on the library items in the sub-folders.

See See "Recipients Audit By Folder Items Report" on page 103 for information on the items displayed.

11.1.1.18. View Review Summary Report For This Folder Only

The Review Summary Report shows a summary review of the selected published report.



The column headings in the above report are described in Table 4.

TABLE 4. Review Summary Report

Item	Description
Library Item	The name of the Document, Questionnaire or Test located in the selected Folder. Active Link. Click to see a *Review History* report for the selected item. See "View Review History Report For This Document." on page 120 for more information.
Description	The name of the Document, Questionnaire or Test located in the selected Folder.
Added By	The name of the person who uploaded or edited this version of the Document, Questionnaire or Test.
Last Edited By	The name of the person who last changed either the: • Uploaded Document • The Test or Questionnaire • Current revision of the Document, Questionnaire or Test
Folder	The name of the folder in which the Document, Questionnaire or Test is located. Active Link. Click to see the Document, Questionnaire or Test located in the selected Folder. See "Folder View Options" on page 93 for more information.
Current Version	The version of the Document, Questionnaire or Test located in the selected Folder.
Current Active Version	The latest active version of the Document, Questionnaire or Test located in the selected Folder.
Date Last Sent For Review	The date the Document, Questionnaire or Test (located in the selected Folder) was last sent for review.
Date Last Review Completed	The date the Document, Questionnaire or Test (located in the selected Folder) was last reviewed.
Next Review Reminder	The date the next review email for the Document, Questionnaire or Test (located in the selected Folder) will be sent.
Item Type (Hidden by default)	A Policy Document has the document type *Document*. A Questionnaire has the document type *Questionnaire*. A Test has the document type *Test*.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click the report's *Close* button to return to the report.

11.1.1.19. View Review Summary Report For This Folder And All Sub-Folders

This report contains the same data as the report above. However, if the current folder contains sub-folders, the report also includes the information on the library items in the sub-folders.

See See “Review Summary Report” on page 105 for information on the items displayed.

Click the report’s *Close* button to return to the library.

11.1.2. Move A Folder

In the folder view, click on the folder you want to move. Drag and drop the folder to the required location.

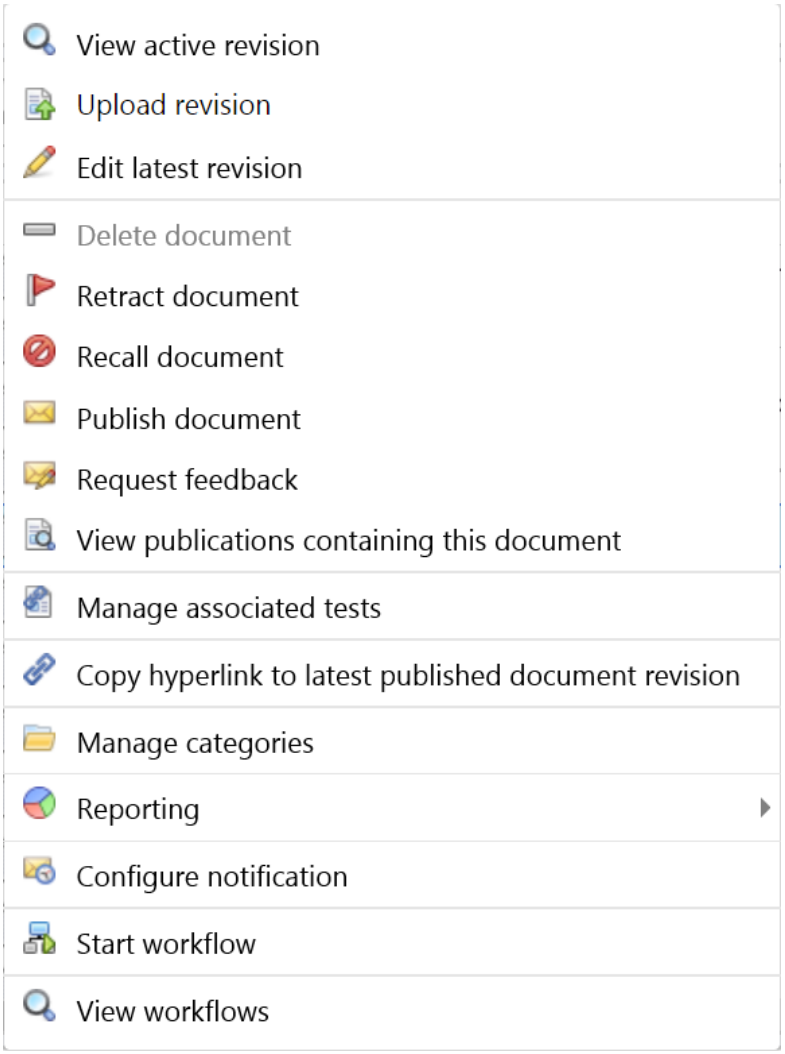
Folders can be moved from the pane on the left to the pane on the right, from the pane on the right to the pane on the left, or to different folders in the same pane.

11.2. Document View Options

The document view options are those options which are available from the pane on the right.

11.2.1. Document Menu

The Document menu is displayed when you right-click on a Document.



11.2.1.1. View Active Revision

Select *View active revision* from the menu.

- PDF documents are opened in the current window. When you have finished viewing the document, click the *Close* button.
- Microsoft® Office documents are opened in the appropriate Office application. When you have finished viewing the document, close the document.

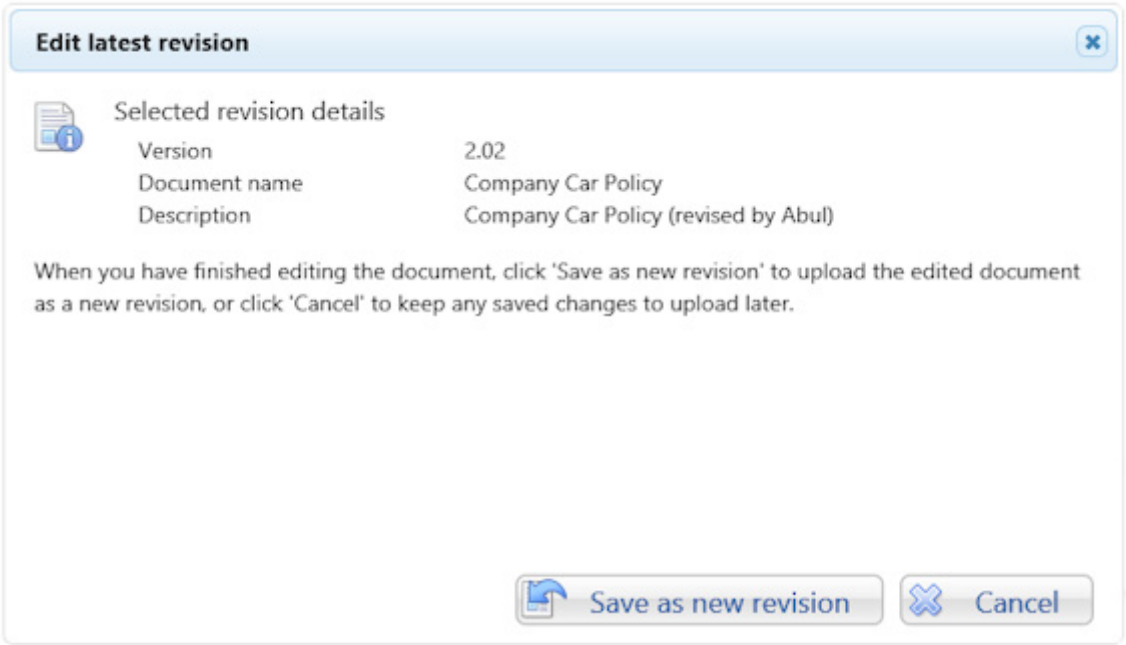
11.2.1.2. Upload Revision

Select *Upload revision* from the menu. A dialog is displayed. Click the *Browse* button and browse to the new revision of the selected document. Click *Open*. The *Upload revision* dialog is displayed. Enter a revision description in the text box and then click the *Upload* button. The file is uploaded as a new revision of the document. This new revision appears at the top of the list of document revisions for the selected document and becomes the *Active* revision.

11.2.1.3. Edit Latest Revision

Right-click an Office document and select *Edit latest revision* from the menu. The latest revision of the Document is opened in the appropriate Office application.

Make the required changes to the document. Save and close the document. You are returned to the *Edit latest revision* dialog.



Click the *Save as new revision* button. The *Document description update* dialog is displayed. Enter a revision description for the new revision and click *Save*. The edited document is added to the library as a new revision of the selected Document.

11.2.1.4. Delete Document

Select *Delete document* from the menu. A dialog is displayed asking you to confirm you want to delete the document. Click on the *Yes* button to delete the document or *No* to exit without deleting the document.

When a document is deleted, all the revisions of the document are deleted.

Note: Only documents which have never been Published can be deleted.

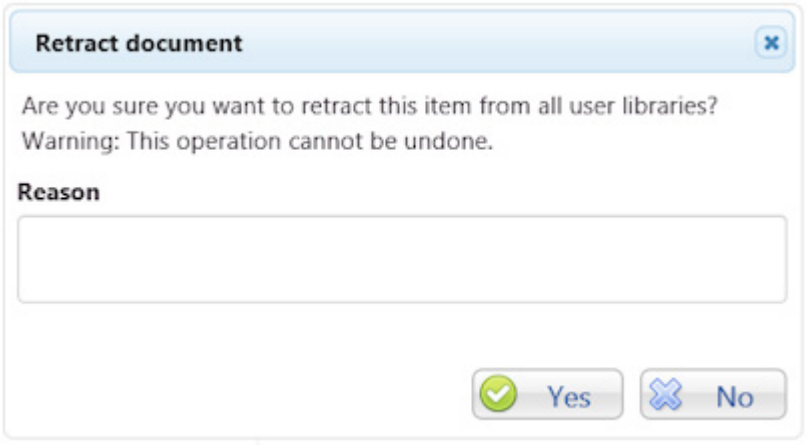
11.2.1.5. Retract Document

Select *Retract document* when the document is no longer relevant.

For example, the document might have been sent out a number of years ago, but it is no longer required and you want to remove it from the libraries of all the recipients of the document. Retracting a *document* removes all version of the document from all the libraries of all recipients.

Note: The publication will also be removed from the users Inbox if the document is still there.

A dialog is displayed.



Enter the reason for retracting the document. This reason will be displayed on the *Retracted Documents* page. Click *Yes* to withdraw the document, or *No* to cancel the retraction.

The option *Retract document* is dimmed for documents which have not been Published.

To retract *just a single revision* of the selected document from all user libraries, see “Retract Revision” on page 137.

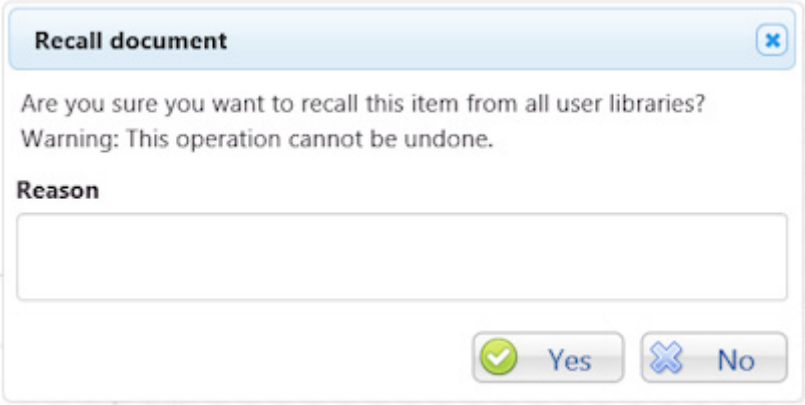
To retract a document from an individual user see “Retract Publication For This User” on page 267.

11.2.1.6. Recall Document

Select *Recall document* when the document was sent in error and you want the document to be removed from the libraries of all the recipients of the document. Recalling a *document* removes all version of the document from all the libraries of all recipients.

Note: The publication will also be removed from the users Inbox if the document is still there.

A dialog is displayed.



Enter the reason for recalling the document. This reason will be displayed on the *Retracted Documents* page. Click *Yes* to recall the document, or *No* if you do not want to recall the document.

The option *Recall document* is dimmed for documents which have not been Published.

To recall *just a single revision* of the selected document from all user libraries, see "Recall Revision" on page 137.

To recall a document from an individual user see "Recall Publication For This User" on page 268.

11.2.1.7. Publish Document

This option opens the *Build New Publication* page with the currently selected Document added to the *Items to be published* pane. See "Publishing Configuration Examples" on page 53 for examples and "Publishing" on page 284 for a description of all the options on the *Build New Publication* page.

11.2.1.8. Send Document For Review

This option opens the *Build New Review Publication* page with the currently selected Document added to the *Items to be published* pane. See "Publishing Configuration Examples" on page 53 for examples and "Publishing" on page 284 for a description of all the options on the *Build New Review Publication* page.

Note: When a Word document is sent for review, the reviewer can make changes to the Document and add comments. When a PDF document or any other non-Word Document is sent for review, the reviewer cannot make changes to the Document. Instead, all suggested changes must be entered as comments.

11.2.1.9. View Publications Containing This Document

Select this option to view all the Publications which have been sent which include the selected Document. See "Publications List" on page 239.

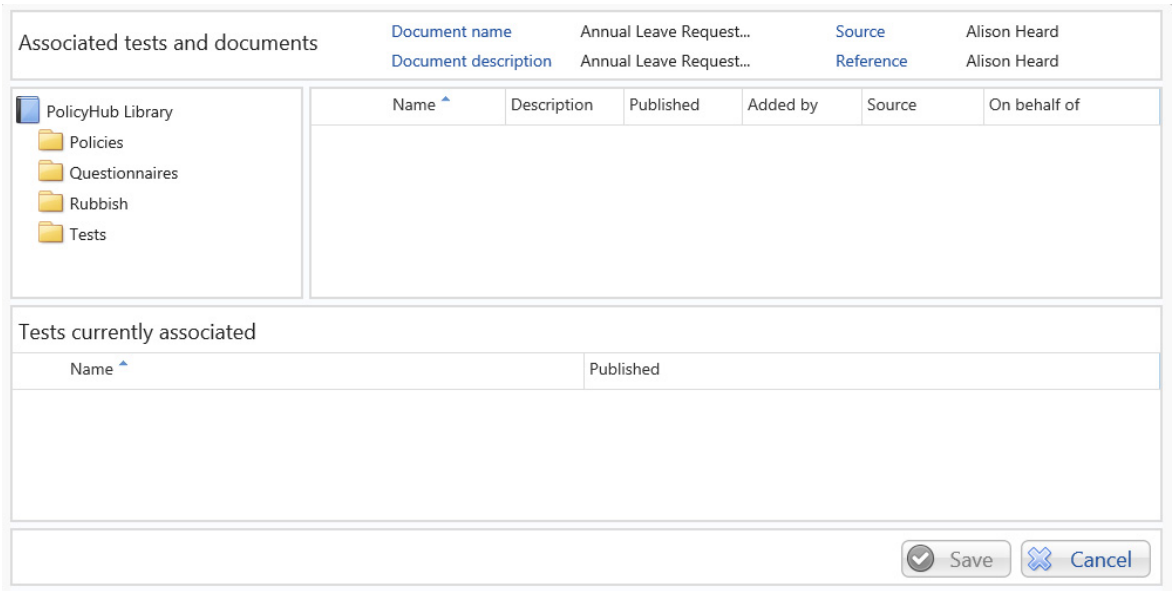
11.2.1.10. Manage Associated Tests

When a Test has been created to test the recipients knowledge of a company policy, you can associate the Test with the policy Document. When this is done, whenever the policy Document is added to a Publication, the active revision of the Test is automatically added to the Publication. This ensures the Test is Published whenever the policy Document is Published. It is, however, possible to remove the Test from the Publication should the Publisher want to Publish the policy without the Test.

Select the policy you want to be associated with a Test.

Right-click on the Document and select *Manage associated tests* from the menu.

The *Associated tests and documents* pane is opened.



The details for the document selected in the library are displayed in the top pane.

Document name – the name of the Document selected in the library.

Document description – the description of the Document selected in the library.

Source – the source of the Document selected in the library.

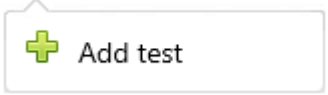
Reference – the name provided for *On behalf of* for the Document selected in the library.

11.2.1.10.1. PolicyHub Library

The library pane on the left shows the folder structure of the library. Select a folder to display the sub-folders and Tests contained in that folder.

Note: Documents and Questionnaires are not displayed.

Select the Test(s) you want to associate with the selected Document and drag them to the *Tests currently associated* pane. Alternatively, right-click on a Test and select *Add test* from the menu.

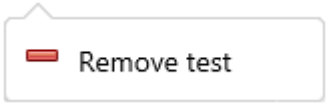


The Test is then added to the *Tests currently associated* pane.

11.2.1.10.2. Tests Currently Associated

The Tests which have been associated with the selected Document are listed, with the number of times the Test has been Published.

To remove a link between a Document and a Test, right-click on the Test in the *Tests currently associated* pane and select *Remove item* from the menu.



The Test is removed from the pane and is no longer associated with the selected Document.

11.2.1.10.3. Buttons

Add tests – Select two or more Tests in the top pane and click *Add tests* to add those Tests to the *Tests currently associated* pane. The Tests are associated with the Document.

Note: The *Add tests* button is displayed only when two or more Tests are selected in the top pane.

Remove tests – Select two or more Tests in the *Tests currently associated* pane and then click *Remove tests* to remove those Tests from the pane. The Tests are no longer associated with the Document.

Note: The *Remove tests* button is displayed only when two or more Tests are selected in the *Tests currently associated* pane.

Save – Save the associated Tests configuration and return to the library.

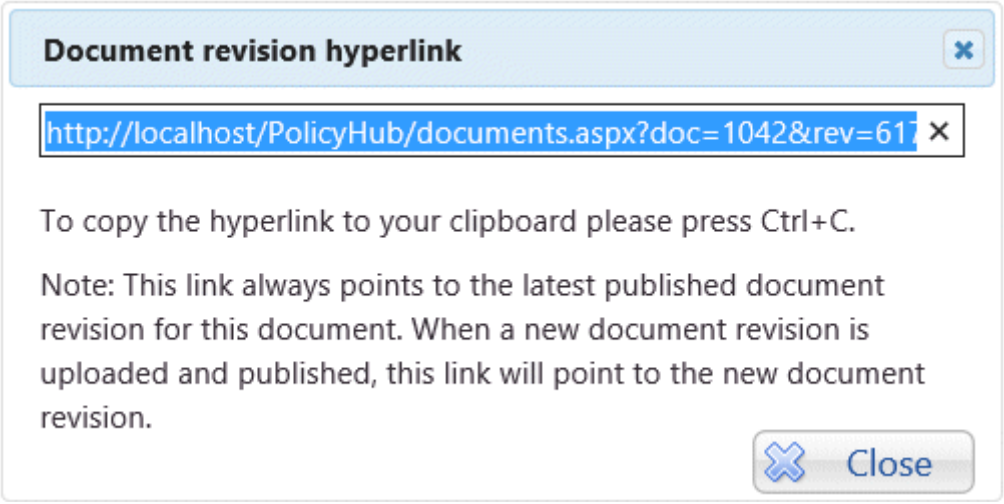
Cancel – Return to the library without saving the associated Tests configuration.

11.2.1.11. Copy Hyperlink To Latest Published Document Revision

When you are creating a policy document, you can include a hyperlink to the latest Published version of another document. The *Copy hyperlink to latest published document revision* option allows you to copy a hyperlink and paste it in the appropriate document.

Select *Copy hyperlink to latest published document revision*. Press *Ctrl+C* to copy the selected link to the clipboard.

Select *Close* to close the dialog box.



Open the document you want to include the hyperlink and select an insertion point. Press *Ctrl+V* on the keyboard to paste the hyperlink into the document. The hyperlink can be renamed in a Word policy document. See "Renaming A Hyperlink (In A Word Document)" on page 17 for details.

11.2.1.11.1. Hyperlink Operation

11.2.1.11.1.1. Inbox Users

The user – depending on the type of link selected by the document author – will see, in their Inbox, either:

- The last document revision published to them (in the format last published to them)
- The specific document revision published to them (in the format the revision was originally published to them).

11.2.1.11.1.2. Auditors

If the user has the existing *Report management* Read access (and access is allowed for the document's folder) when the link is set to a specific document revision, the user will see that revision.

When the link is set to the latest document revision, the user will have the following choices:

- *View latest document revision* – This displays the last document revision published (to anyone) in the format it was last published.
- *View specific document revision* – This displays the revision that was marked as Active at the time the link was created.

Note: This will usually be the revision that was published after the link was created, i.e. the version which the publication recipients saw, however, this may not be so in all cases.

11.2.1.11.1.3. PolicyHub Library Users

If the user has the existing PolicyHub library viewing permission (and permission to see the document's folder), the user can see unpublished document revisions in addition to published document revisions, thus enabling hyperlinks to be tested before sending the document for publication.

11.2.1.12. Manage Categories

Refer to "Manage Categories" on page 96 for a description of this menu selection.

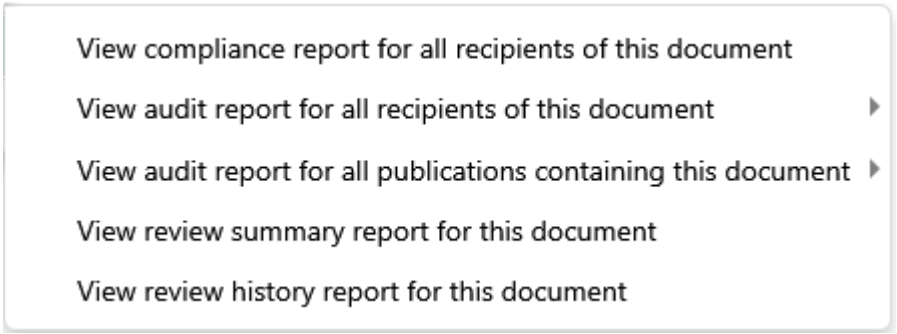
Note: Depending on your PolicyHub licence, Categories may not be available in the application software.

11.2.1.13. Reporting

In the PolicyHub library, you can investigate the compliance to a *Document* by the recipients and view audit reports for the Document.

Right-click on a document in the PolicyHub library and select *Reporting*.

The following menu is displayed.



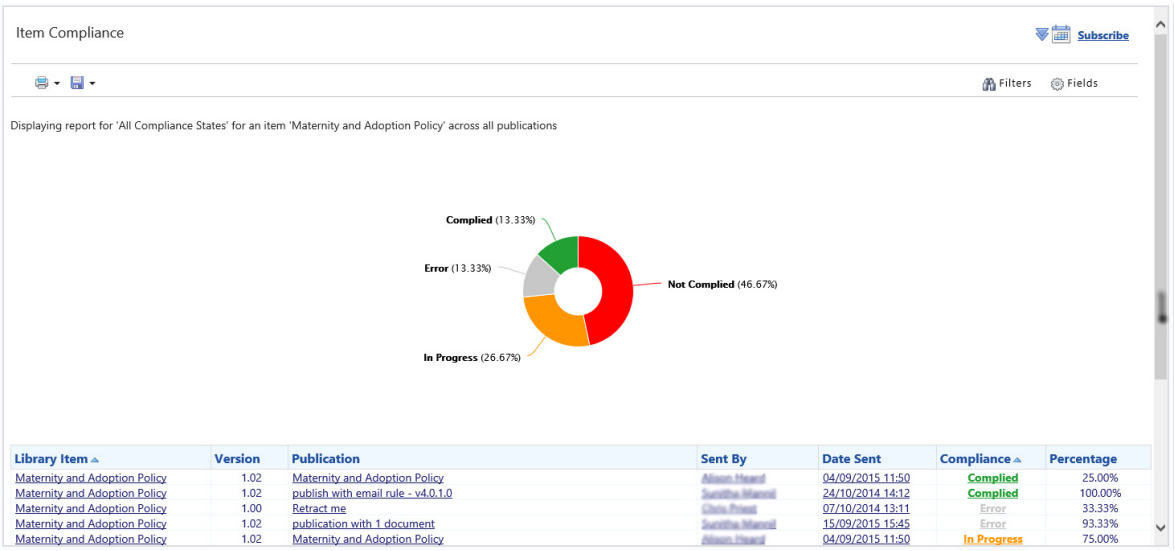
When selected, each menu item will generate a report.

To investigate in more detail, click on any of the active links (underlined text) in the report.

Note: A report toolbar is displayed on each report. See "Report Toolbar" on page 363 for a description of the toolbar.
Each report includes a *Filters* tab which displays or hides filters which can be used to refine the report. For more information about adding and or changing filtering options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372 and "Changing the Default Filtering Option" on page 373.
Each report also has the capability to sort data within each column. For more information See "Sorting Report Data Within Columns" on page 376.
The reports also include a *Fields* tab which displays or hides fields which can also be used to refine the report. For more information see "Adding/Removing Columns From Reports" on page 376. Large reports contain a tool bar to navigate between report pages. For more information See "Report Pagination" on page 377.
The *Subscribe* button enables the User to create a report subscription. For more information see "Creating Subscriptions" on page 380.

11.2.1.13.1. View Compliance Report For All Recipients Of This Document

This report shows the compliance status for all the recipients of the selected document.



The column headings in the above report are described in Table 5.

TABLE 5. Item Compliance Report

Item	Description
Library Item	The name of the Document, Questionnaire or Test you right-clicked in the library. Active Link. Click to display the *Item Compliance* report for the selected library item for all Publications.
Version	The version of the document which was included in the Publication.
Publication	The name of the Publication this version of the document was published with, on the date shown. Active Link. Click to display the *Item Compliance* report for the selected Document, Questionnaire or Test for the selected Publication only.
Sent By	The name of the person who published this version of the document on the date shown. Active Link. Click to see the *Publication Compliance* report for the selected user. See “Publication Compliance Report” on page 367 for more information.
Date Sent	The date the Publication was sent. Active Link. Click to see the *Publication Compliance* report for all Publications sent on the selected date. See “Publication Compliance Report” on page 367 for more information.

TABLE 5. Item Compliance Report

Item	Description
Compliance	The compliance status (Complied, In Progress, Not Complied or in Error) of this Document. Active Link. Click to display the *User Action* report for the selected users and the selected Compliance Status. See "User Action Report" on page 270 for more information.
Percentage	The percentage of recipients of the Publication with the compliance state shown.
Publication Status (Hidden by default)	Publications have the status *Completed* when: • They have been complied with by all recipients. • The rule used for Publication has expired. • They were Published directly into user library. Publications are *Active* when there are still some outstanding publications to be complied with and the rule has not expired. Publications have the status *Error* when they weren't sent because of an error. Publications have the status *Retracted* when the Publication was *Retracted*. Publications have the status *Recalled* when the Publication was *Recalled*.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

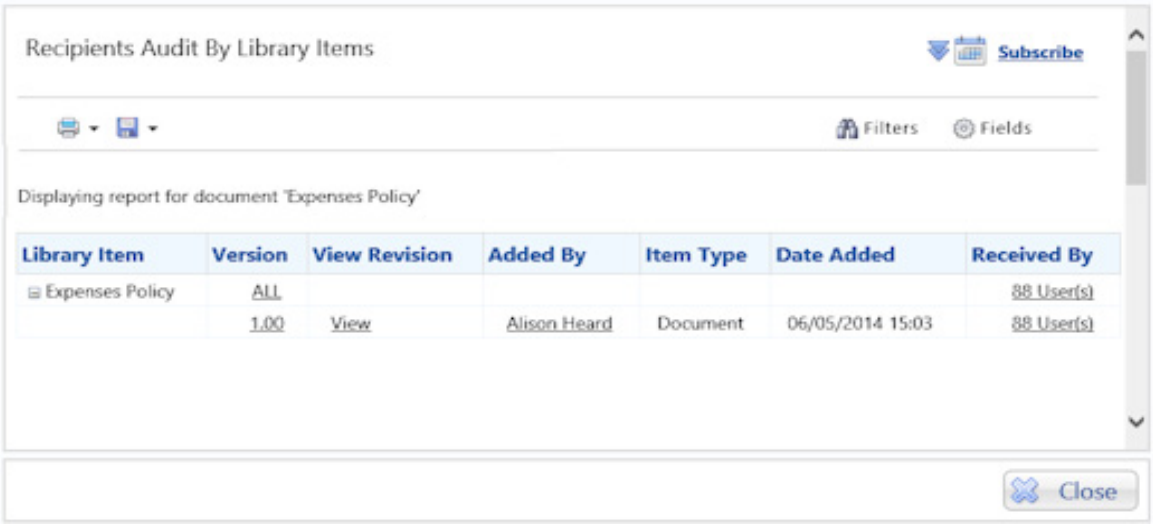
Click *Close* to return to the folder containing the selected document.

11.2.1.13.2. View Audit Report For All Recipients Of This Document

From the selected menu item, select one of the following sub-menu options:

- *Across all dates* – shows the report with no date filter.
- *For a specific date range* – shows the report for Publications containing this Document which were sent on the days specified only.

This report shows the number of recipients of each Published version of the document.



The column headings in the above report are described in Table 6.

TABLE 6. Recipients Audit By Library Items Report

Item	Description
Library Item	The name of the document you right-clicked in the library.
Version	The version of the document that was edited by the person shown. Active Link. Click on a document version to display the *Library Item Audit By Recipients* report for the selected document version. See "Library Item Audit By Group Report" on page 318 for more information.
View Revision	Active Link. Click *View* to view the selected document revision.
Added By	The name of the person who uploaded or edited this version of the document. Active Link. Click to open the *User Information* report for the selected user. Report. See "User Information Report" on page 121 for information.
Item Type	A Policy Document has the document type *Document*. A Questionnaire has the document type *Questionnaire*. A Test has the document type *Test*.
Date Added	The date and time this version of the Document was uploaded.
Received By	The number of recipients of the version of the document. Active Link. Click on a number in the Received By column to display the *Library Item Audit By Recipients* report for the users who received the selected document version. See "Library Item Audit By Group Report" on page 318 for more information.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

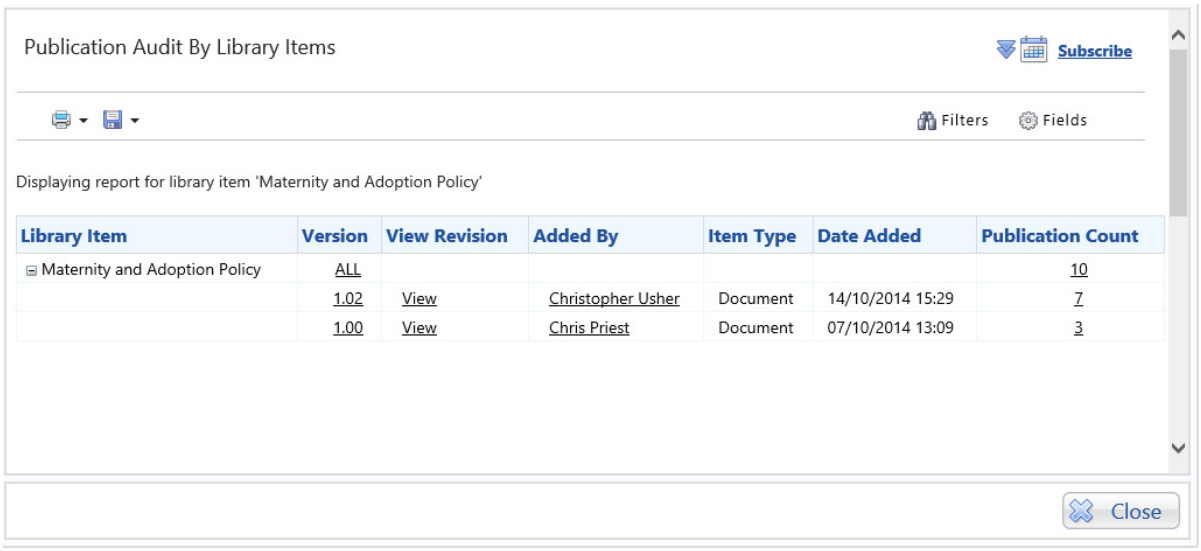
Click *Close* to return to the folder containing the selected document.

11.2.1.13.3. View Audit Report For All Publications Containing This Document

From the selected menu item, select one of the following sub-menu options:

- *Across all dates* – shows the report with no date filter.
- *For a specific date range* – shows the report for Publications containing this Document.

This report shows the number of times each version of the selected item was published.



The column headings in the above report are described in Table 7.

TABLE 7. Publication Audit Report

Item	Description
Library Item	The name of the Document, Test or Questionnaire you right-clicked in the library.
Version	The version of the Document, Test or Questionnaire that was *Added by* the person shown. Active Link. Click the version to display the *Library Item Audit By Publication* report for the selected Library Item version. See "Library Item Audit By Publication Report" on page 255 for more information.
View Revision	Active Link. Click *View* to view the selected Document revision or *Preview* to preview the selected Test or Questionnaire revision.

TABLE 7. Publication Audit Report

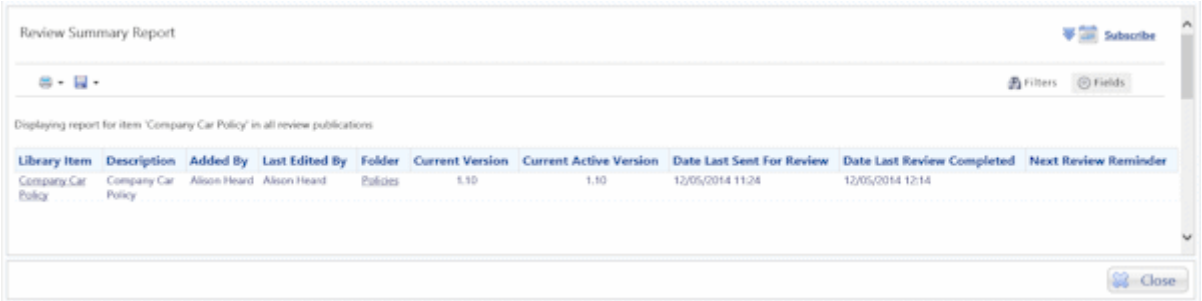
Item	Description
Added By	The name of the person who uploaded or edited this version of the Document, Questionnaire or Test. Active Link. Click to open the *User Information* report for the selected user. Report. See "User Information Report" on page 121 for information.
Item Type	A Policy Document has the document type *Document*. A Questionnaire has the document type *Questionnaire*. A Test has the document type *Test*.
Date Added	The date and time this version of the Document, Questionnaire or Test was uploaded.
Publication Count	The number of times the version of the Document, Test or Questionnaire was published. Active Link. Click the Publication Count to display the *Library Item Audit By Publication* report for the Publications included in the selected Publication Count. See "Library Item Audit By Publication Report" on page 255 for more information.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click *Close* to return to the folder containing the selected document.

11.2.1.13.4. View Review Summary Report For This Document

The Review Summary Report shows a summary review of the selected document.



The column headings in the above report are described in Table 8.

TABLE 8. Review Summary Report

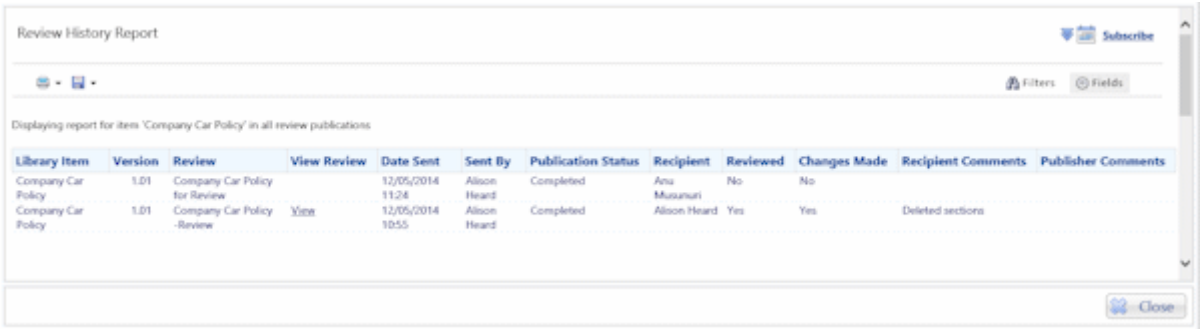
Item	Description
Library Item	The name of the selected Document, Questionnaire or Test. Active Link. Click to see a *Review History* report for the selected item. For more information, see "View Review History Report For This Document." on page 120
Description	The name of the Document, Questionnaire or Test located in the selected Folder.
Added By	The name of the person who uploaded or edited this version of the Document, Questionnaire or Test.
Last Edited By	The name of the person who last changed either the: • Uploaded Document • The Test or Questionnaire • Current revision of the Document, Questionnaire or Test
Folder	The name of the folder in which the Document, Questionnaire or Test is located. Active Link. Click to see the Document, Questionnaire or Test located in the selected Folder. See "Folder View Options" on page 93 for more information.
Current Version	The version of the Document, Questionnaire or Test located in the selected Folder.
Current Active Version	The latest active version of the Document, Questionnaire or Test located in the selected Folder.
Date Last Sent For Review	The date the Document, Questionnaire or Test (located in the selected Folder) was last sent for review.
Date Last Review Completed	The date the Document, Questionnaire or Test (located in the selected Folder) was last reviewed.
Next Review Reminder	The date the next review email for the Document, Questionnaire or Test (located in the selected Folder) will be sent.
Item Type (Hidden by default)	A Policy Document has the document type *Document*. A Questionnaire has the document type *Questionnaire*. A Test has the document type *Test*.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click *Close* to return to the selected document.

11.2.1.13.5. View Review History Report For This Document.

The View Review History Report shows the review history of the selected document.



The column headings in the above report are described in Table 9

TABLE 9. Review History Report

Item	Description
Library Item	The name of the selected publication (Document, Questionnaire or Test).
Version	The version of the reviewed publication.
Review	The name of the reviewed publication.
View Review	Active Link. Click the underlined *View* text link to inspect the reviewed publication.
Date Sent	The date the reviewed publication was sent.
Sent By	The name of person who sent the selected publication.
Publication Status	Publications have the status *Completed* when: • They have been complied with by all recipients. • The rule used for Publication has expired. • They were Published directly into user library. Publications are *Active* when there are still some outstanding publications to be complied with and the rule has not expired. Publications have the status *Error* when they weren't sent because of an error. Publications have the status *Retracted* when the Publication was *Retracted*. Publications have the status *Recalled* when the Publication was *Recalled*.
Recipient	The name of the person who received the publication.
Reviewed	Indicates whether the publication was reviewed. Yes - has been reviewed. No - has not been reviewed.
Changes Made	Indicates whether changes have been made. Yes - changes have been made. No - changes have not been made.

TABLE 9. Review History Report

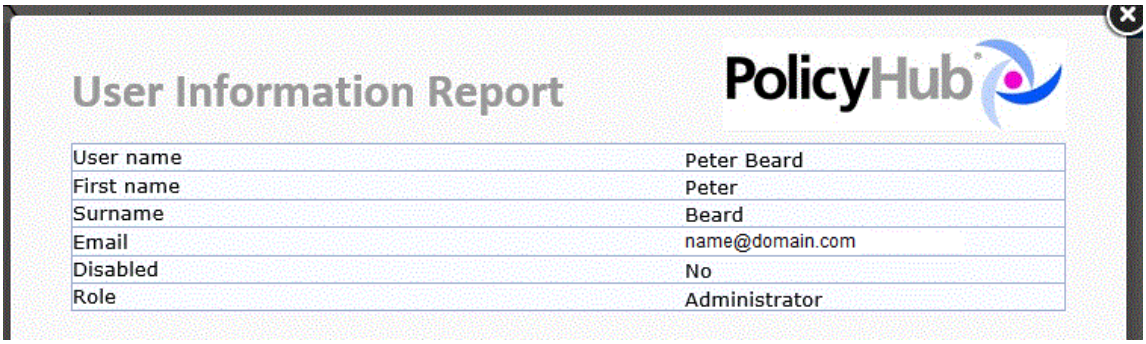
Item	Description
Recipient Comments	Optional (helpful) comments added by the person who received the publication.
Publisher Comments	Optional (helpful) comments added by the person who published the review publication.
Added By (Hidden by default)	The name of the person who uploaded or edited this version of the Document, Questionnaire or Test.
Description (Hidden by default)	The name of the publication in the selected folder.
Revision Description (Hidden by default)	The description entered when this revision was saved.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click *Close* to return to the selected document.

11.2.1.14. User Information Report

When you click on a person's name, under the *Added By* heading, in the *Publication Audit Report* (see "View Audit Report For All Publications Containing This Test" on page 183) the *User Information* report is displayed.



The column headings in the above report are described in Table 10.

TABLE 10. User Information Report

Item	Description
User Name	The name of the user who received the report.
First Name	The given name of the user who received the report.
Surname	The family name of the user who received the report.
Email	The email address of the user who received the report.

TABLE 10. User Information Report

Item	Description
Disabled	Indicates whether the user's account is currently active. No - not disabled Yes - disabled
Role	The role assigned to the user who received the report.

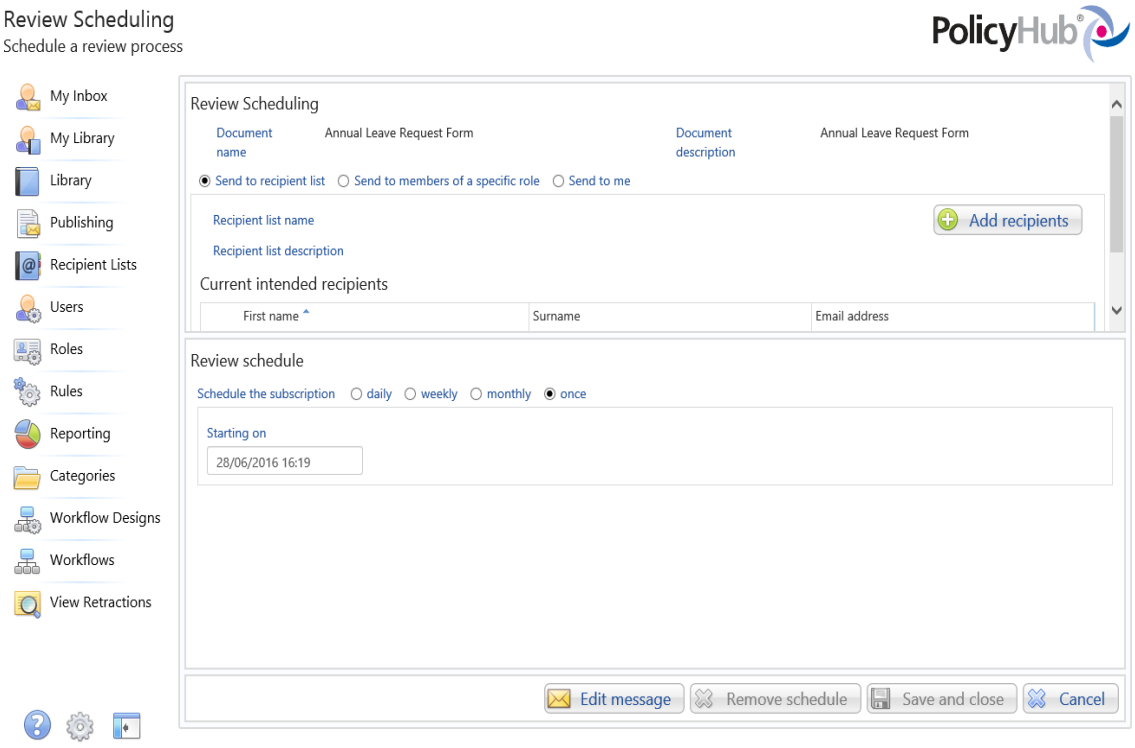
Click the User Information Report's '**X**' icon, in the top right-hand corner, to return to the report.

11.2.1.15. Configure Review Schedule or Configure Notification

Note: Depending on your PolicyHub system licence, the menu selection displayed will either be "Configure Review Schedule" *or* "Configure Notification".

11.2.1.15.1. Configure Review Schedule

PolicyHub Users can have *Read* document and *Questionnaire* review reminder emails sent to them at regular intervals to remind them to review Policies and Questionnaires to determine if they need to be updated.



These reminders can be configured to be sent *once*, or at various *daily*, *weekly* or *monthly* intervals for a defined period of time to a selected list of Users.

Document name – the name of the document for which the review is being scheduled.

Document description – the description of the document for which the review is being scheduled.

Select one of the following radio buttons.

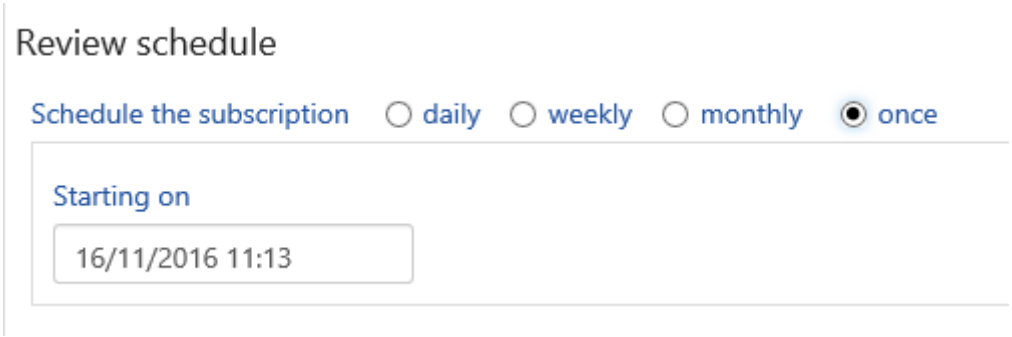
Send to recipient list – to send the review reminder message to a named, or unnamed, Recipient List. Select the *Send to recipient list* radio button and then click the *Add recipients* button. You are taken to the *Select recipients to be used scree*n. Select the required Recipient List(s) from those displayed in the *Recipient lists* pane. From this screen you can view the members of the selected Recipient List or create a new named or unnamed Recipient List. See "Recipient Lists" on page 297 for a description of the menus and buttons. See "Recipient List Configuration Examples" on page 61 for examples on creating Recipient Lists.

Send to members of a specific role – to send the review reminder message to the members of the selected Role. Select the *Send to members of a specific role* radio button and then select a Role from the *Roles* drop-down list. All members of the selected Role are listed under the *Current intended recipients*. These Users will receive the email reminding them the document should be reviewed.

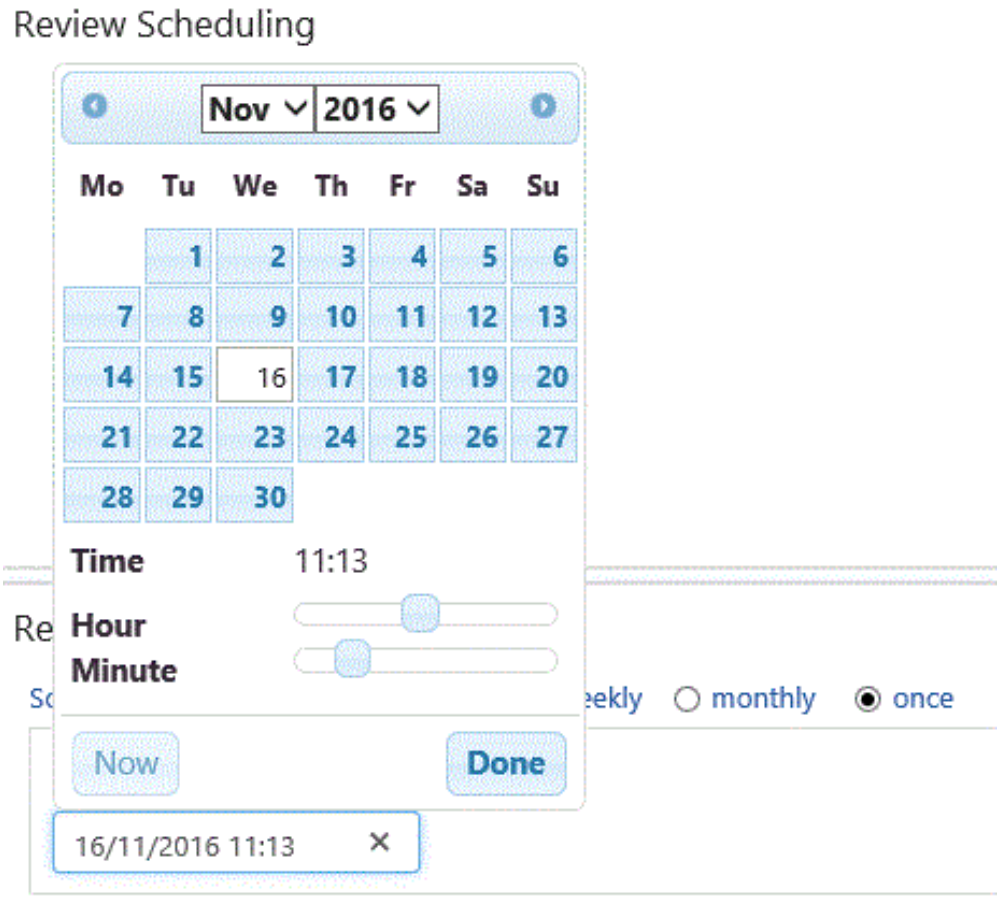
Send to me – to send the review reminder message to yourself only. Select the *Send to me* radio button. Only the User creating the review reminder schedule will receive an email reminding them the document should be reviewed.

11.2.1.15.1.1. Configuring The Review Reminder Schedule

The default setting is *once.*

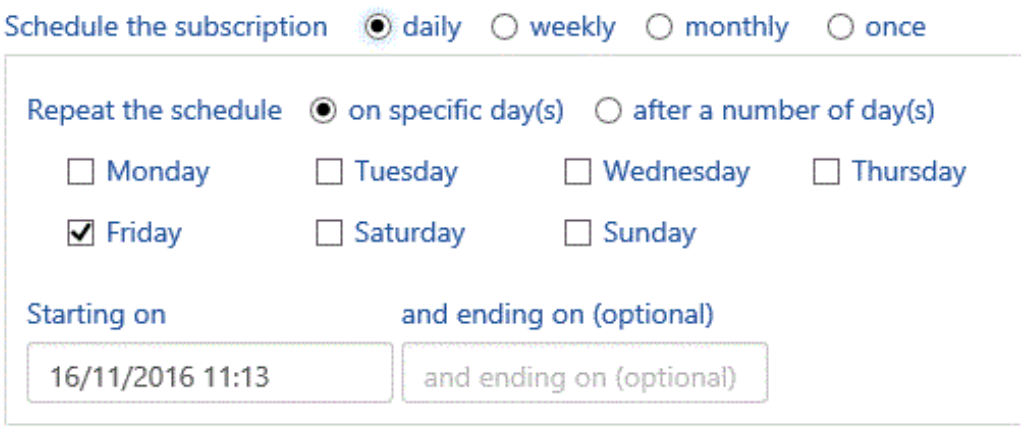


When *once* is selected, click in the *Starting on* box to open a calendar. Select the date and the time.



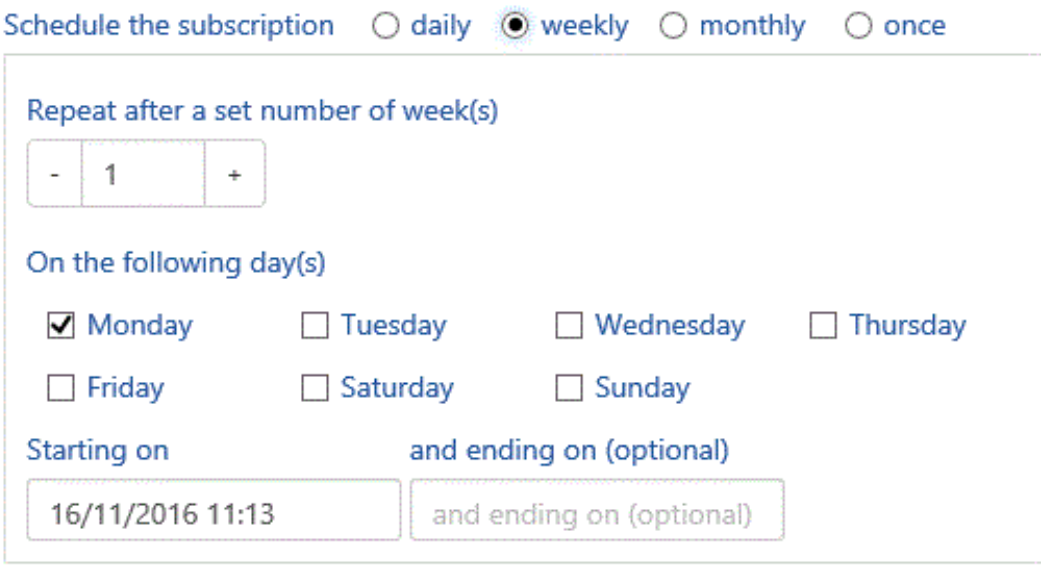
Click *Done* when you have configured the required date and time.

When *daily* is selected, you can *either* choose the days of the week on which to send out the report (*on specific days*), *or* you can select *after a number of day(s)* and enter (for example *2*) which would send the report out on the *Starting on* day and then every other day after that.



When *weekly* is selected, you can set a value for *Repeat after a set number of week(s)* and you can select the days of the week you want the reminder to be sent. For example, to send a

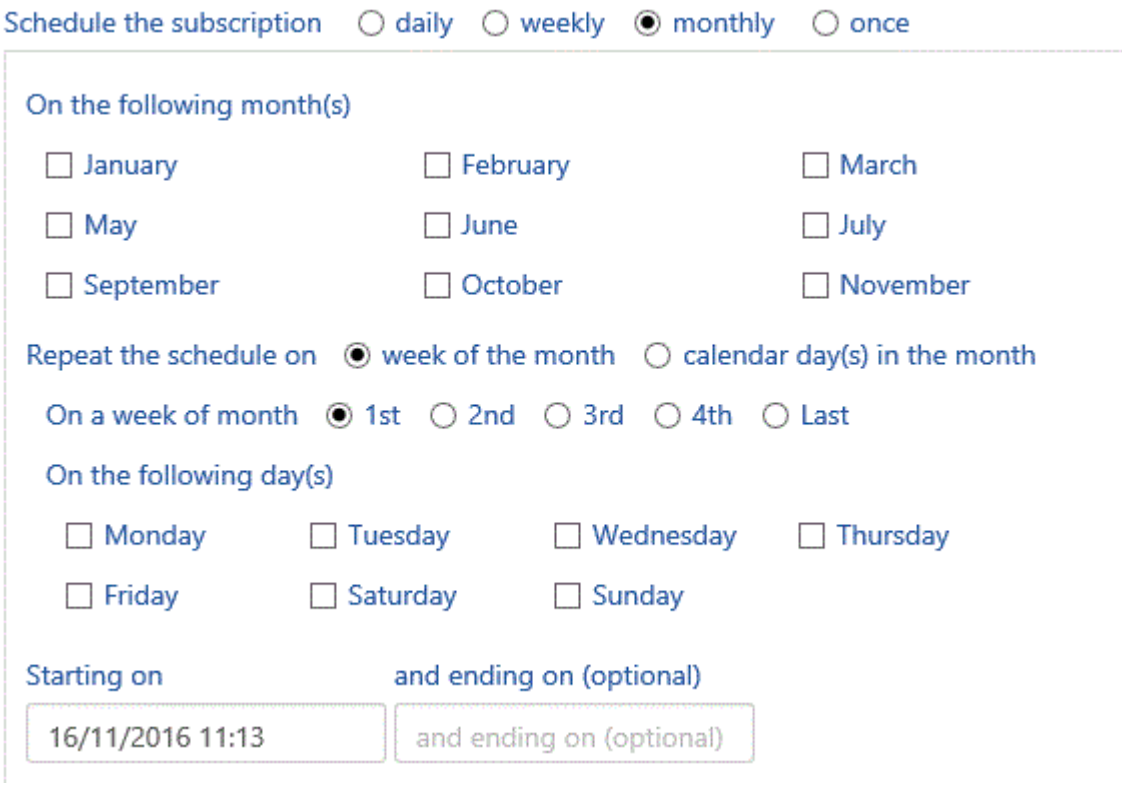
review reminder every other Monday, set *Repeat after a set number of week(s)* to *2* and select Monday.



When *monthly* is selected, you can select the months you want the review reminder to be sent out. The review reminder can then be sent out on specified weeks of the month, or on specified calendar days of the month.

When *week of the month* is selected, the review reminder can be sent out on the *1st, 2nd, 3rd 4th* or *Last* week of the month on the specified days of the week. When *calendar day(s) in the month* is selected, one or more calendar days can be entered in the text box.

A comma must be used to separate multiple values.



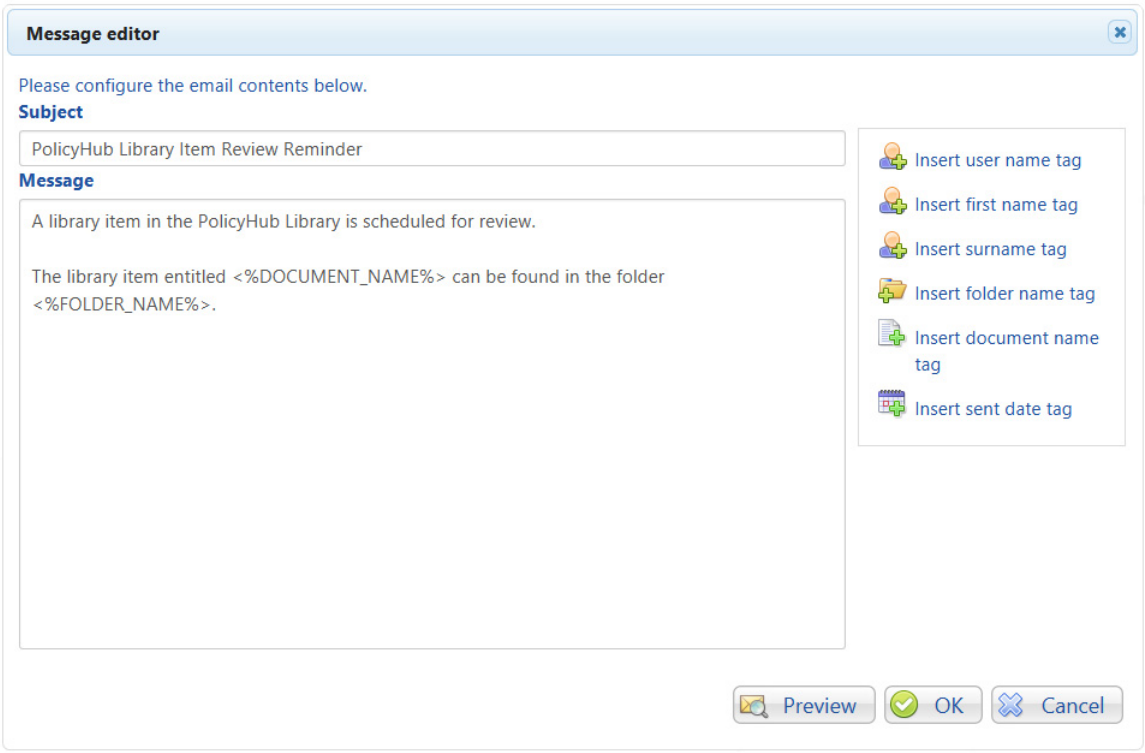
Complete the required *daily, weekly* or *monthly* review reminder schedule details, as required. When you have completed your selection, click in the *Starting on* text box and, from the pop-

up calendar, select the date you want the report subscription to start. Use the slider controls to set the time you want the schedule to start.

Daily, *weekly* and *monthly* review reminders can be left to run indefinitely, or you can configure an end date for the schedule. To set an end date, click in the *and ending on (optional)* text box and select a date from the pop-up calendar. Click *Done* when you have selected the required date. The subscription ends at the end of the selected day.

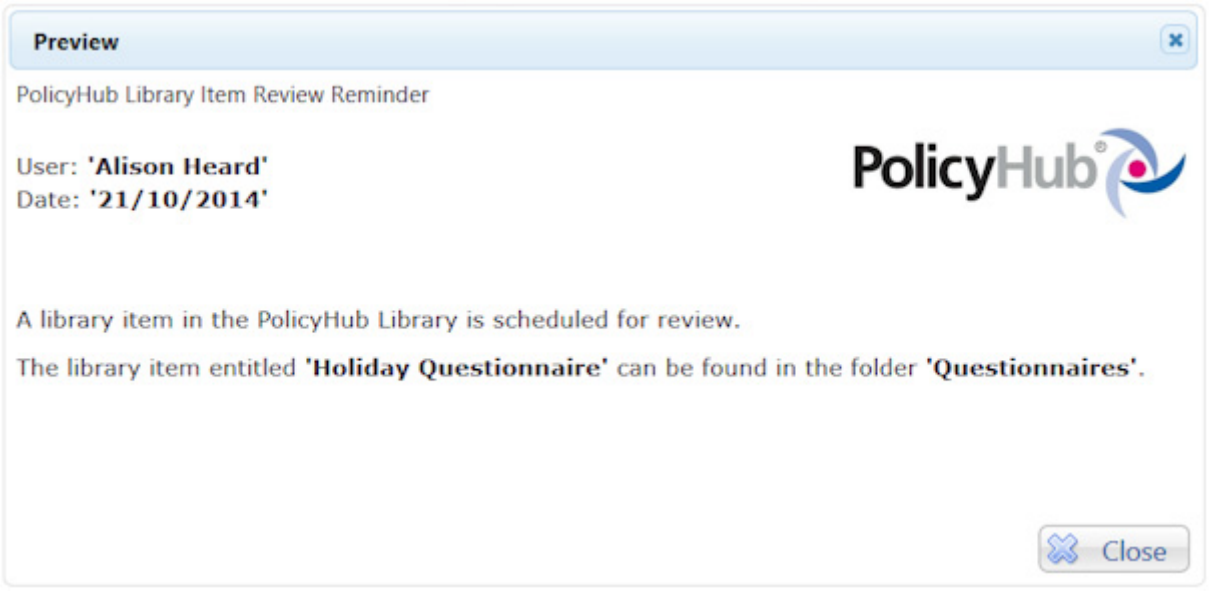
11.2.1.15.1.2. Editing The Message

Click the *Edit message* button to open the *Message editor.*



Edit the *Subject* and/or *Message* text, as required. Select an insertion point and insert a new tag from the *Insert document name tag*, *Insert user name tag*, *Insert sent date tag* and the *Insert folder name tag*, as required.

To preview the edited message, select *Preview*. The message is show in the *Preview* window as it will appear when it is sent.



Click *Close* to close the Preview window.

Select *OK* to save your review reminder schedule changes or select *Cancel* to cancel your actions and close the *Review Scheduling* page.

11.2.1.15.1.3. Editing A Review Reminder Schedule

To edit a review reminder schedule, select the required item in your PolicyHub library.

All documents which have a configured review reminder schedule have a *Next review* date displayed (or *None* if the dates have passed) in the PolicyHub library. To edit the configured review schedule, right-click on the selected item and, from the menu, select *Configure review schedule*.

Note: When a schedule which was scheduled *once* has expired, the date is displayed in the *Next review* column, not *None*.

Edit the schedule, as required. Click the *Save and close* button, to return to your PolicyHub library. Select *Cancel* to exit without saving your edits and return to your PolicyHub library.

11.2.1.15.1.4. Deleting A Review Reminder Schedule

To delete a review reminder schedule, select the required item in your PolicyHub library.

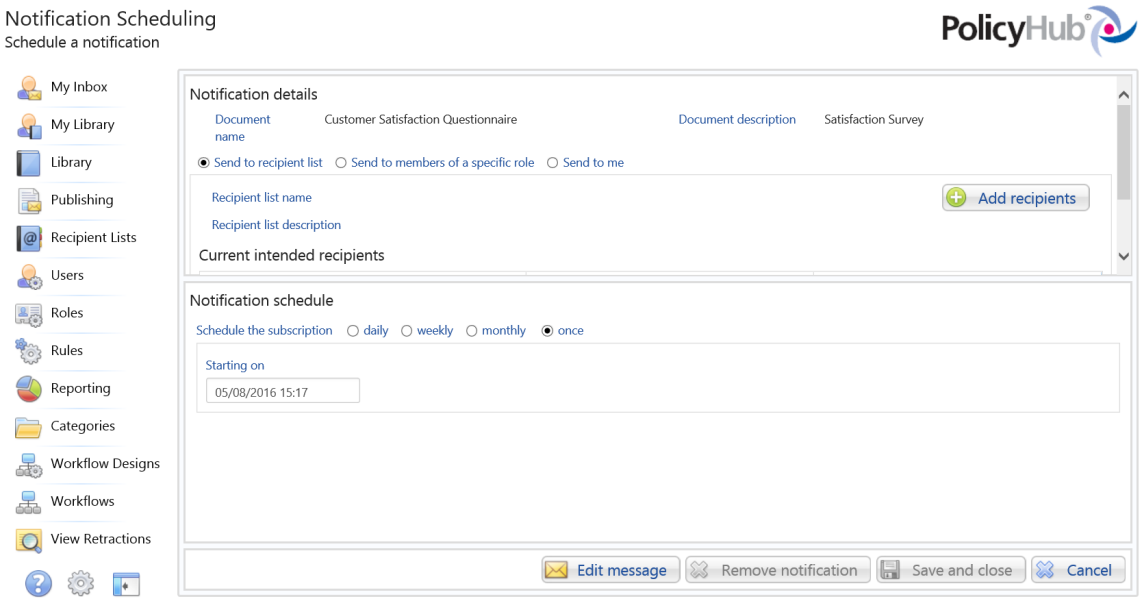
All documents which have a configured Review schedule have a *Next review* date displayed (or *None* if the dates have passed) in the PolicyHub library. To delete the configured review schedule, right-click on the selected item and, from the menu, select *Configure review schedule*.

To delete the schedule, click the *Remove schedule* button.

Click *Yes* to confirm your action and return to your PolicyHub library, or click *No* to cancel your action.

11.2.1.15.2. Configure Notification

PolicyHub Users can have *Read* document and *Questionnaire* notification reminders emails sent to them at regular intervals to remind them to review Policies and Questionnaires to determine if they need to be updated.

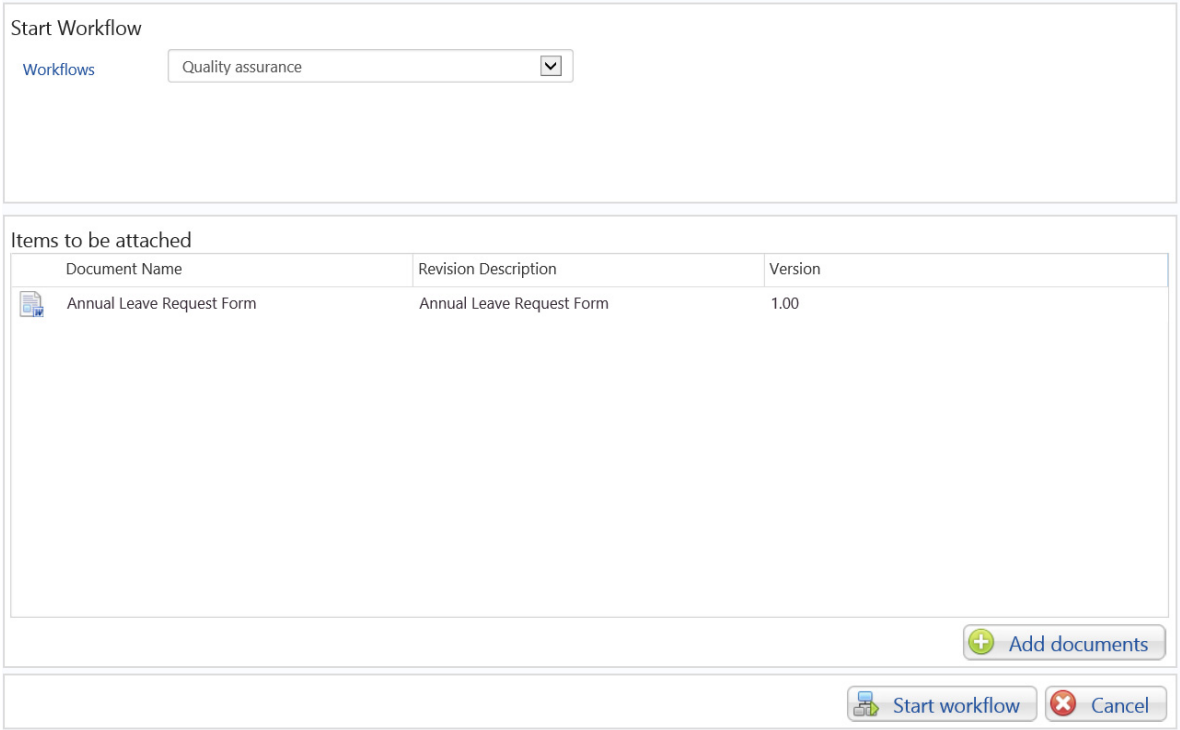


The notification configuration settings are the same as those described in “Configure Review Schedule”.

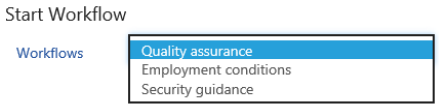
11.2.1.16. Start Workflow

The *Start workflow* page allows you to select one or more documents and start a new workflow for publication.

From the document library right click on the document or questionnaire you wish to attach to the workflow. Select the *Start workflow* option from the drop down menu and the *Start workflow* pane is displayed.



From the drop down *Start Workflow* menu, you can chose any workflow that has previously been activated, see “Workflow Designs” on page 399 for more information on menus and options.



Select the activated workflow that you wish to publish the document with.

11.2.1.16.1. Items To Be Attached

Note: Only the active version of the document is visible in the *Item to be attached* pane.

Right clicking on the selected document will display two menu options:

- View this item.
- Remove this item.

See “View This Item” on page 292 and “Remove This Item From The Publication” on page 293 for more information on the menus and options.

11.2.1.16.1.1. Add Documents Button

Selecting the *Add documents* button at the bottom of the pane allows you to add more documents to the review workflow for publication.

See “Add Documents Button” on page 292 for details how to add one or more documents.

11.2.1.16.1.2. Start Workflow

Selecting the *Start workflow* button will begin the document review and approval workflow. Before starting the workflow you can add documents to the review using the *Add documents* button. You can also remove documents from the review by right clicking on the unwanted document.

After the review has been sent to the recipients Inbox the review and approval workflow menu closes and the Workflows menu open providing a summary and history of the document you have just to sent, see “View Workflows” on page 129 for further details.

The *Cancel* button will stop the Workflow and return you to the Library menu.

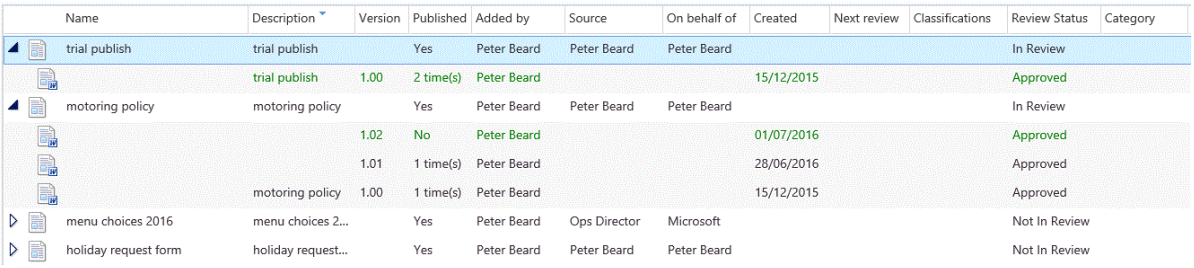
11.2.1.17. View Workflows

Right-click on a document and select *View workflows* from the menu.

This option opens the *Review and approvals workflows* pane, see “Workflows” on page 412 for a description of all the options on the *Review and approvals workflow* pane.

11.2.2. View Library Item's Details

Select a document and click on the white triangle to the left of the name. The document revision information is displayed below the selected document.



Name	Description	Version	Published	Added by	Source	On behalf of	Created	Next review	Classifications	Review Status	Category
trial publish	trial publish		Yes	Peter Beard	Peter Beard	Peter Beard				In Review	
	trial publish	1.00	2 time(s)	Peter Beard			15/12/2015			Approved	
motoring policy	motoring policy		Yes	Peter Beard	Peter Beard	Peter Beard				In Review	
		1.02	No	Peter Beard			01/07/2016			Approved	
		1.01	1 time(s)	Peter Beard			28/06/2016			Approved	
	motoring policy	1.00	1 time(s)	Peter Beard			15/12/2015			Approved	
menu choices 2016	menu choices 2...		Yes	Peter Beard	Ops Director	Microsoft				Not In Review	
holiday request form	holiday request...		Yes	Peter Beard	Peter Beard	Peter Beard				Not In Review	

The column headings describing the information for each library item in the above view are described in Table 11

TABLE 11. Viewing Document Details

Term	Description
Icon	– a Document. – a Document which has been associated with one or more Tests. The icon for a document revision indicates whether the document revision is a PDF document, a Word document, an Excel document, a PowerPoint document or a text file. – a Template. – a Questionnaire. This is also the icon for a Questionnaire revision which has passed validation. – a Questionnaire revision which has failed validation. – a Test. This is also the icon for a Test revision which has passed validation. – a Test which has been associated with one or more Documents. – a Test revision which has failed validation.
Name	The name of the library item. For an item revision, this column is blank.
Description	The description given to the item or to the revision of the item (as appropriate).
Version	The version number assigned to the revision of the item. The minimum version number is 0.01. The maximum revision number is 999.99. For the library item, this column is blank.

TABLE 11. Viewing Document Details

Term	Description
Published	For a library item, this column displays *Yes* to indicate one or more revisions of the document have been Published, or *No* to indicate no revisions of the document has been Published. For a revision of a library item, this column displays the number of times the revision of the item has been Published, or *No* if the revision has not been Published.
Added by	The name of the person who uploaded or edited this version of the Document, Questionnaire or Test.
Source	For a library item, this column displays the name or department entered for the item's *Source* field. For a revision of a library item, this column is blank.
On behalf of	For a library item, this column displays the name or department entered for the item's *On behalf of* field. For a revision of a library item, this column is blank.
Created	The date the revision was created.
Next review	The date the next review reminder will be sent out. See "Configure Review Schedule or Configure Notification" on page 122 for more information on scheduling a review reminder. *Done* – review reminder schedule has expired. **Note:** When a schedule which was scheduled *once* has expired, the date is displayed in the *Next review* column, not *None*. Blank when there is no review reminder scheduled.
Classifications	For a document, this column displays the Classifications assigned to the Document. For a Questionnaire, Test or Document revision, this column is blank. **Note:** This column is displayed only when Classifications are enabled.

TABLE 11. Viewing Document Details

Term	Description
Review Status	This column displays the review status of a Workflow, there are two conditions: • In Review - indicates the Workflow is in review. • Not in Review - indicates that the Workflow has been completed. If a workflow is in review, any documents published with that workflow will be marked *Draft*. When the workflow is not in review any documents published with the workflow will be marked *Approved*. When there are revisions to the document the active document will be marked *Approved*. Previous versions will be annotated *Approved*. For further Workflow review details see "Workflows" on page 412. **Note:** Review Status is available depending on your PolicyHub system licence.
Category	The name of the Category assigned to the Workflow, see "Categories" on page 388. **Note:** Category is available depending on your PolicyHub system licence.

11.2.3. Editing A Library Item's Details

Open the folder containing the library item whose details you want to edit.

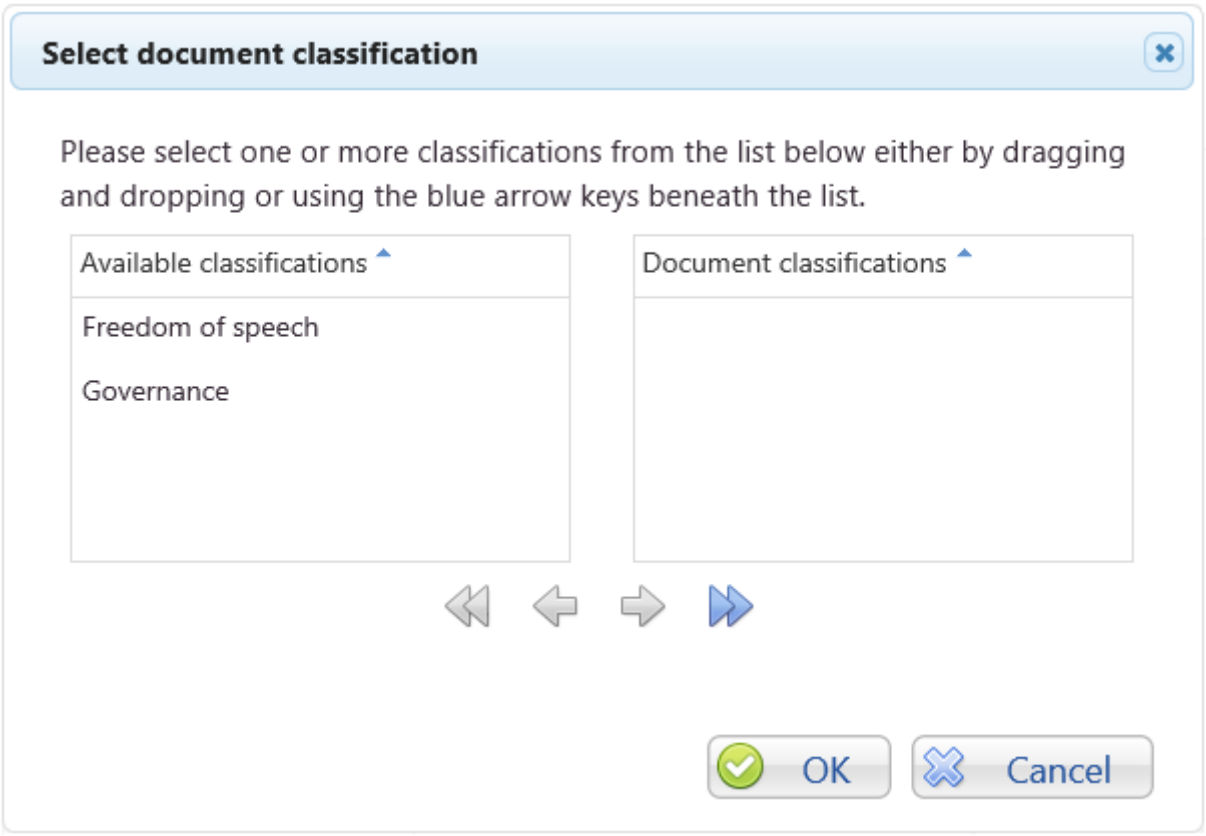
The following fields can be edited by double-clicking on the cell containing the pencil icon and make the required changes. Click away from the field you are editing to save the changes.

- *Name* – the maximum length of the name is 99 characters.
- *Description* – the maximum length of the description is 200 characters.
- *Source* – the maximum length of the source is 200 characters.
- *On behalf of* – the maximum length of *On behalf of* is 99 characters.
- *Classifications* – the Classifications assigned to the Document. For a Questionnaire, Test or Document revision, this column is blank.

Note: The *Classifications* column is displayed only when Classifications are enabled.

11.2.3.1. Editing The Classifications

Double-click on the pencil in the Classification column of the Document. The *Select document classification* dialog is displayed.



The *Available classifications* are listed on the left. Select the Classification you want to associate with the selected document and click the single right arrow to move the Classification to the *Document classifications* pane on the right. Use the double right arrow to move *all* Classifications to the *Document classifications* pane on the right.

To remove unwanted Classifications from the pane on the right, select the Classification and click the single left arrow to move the Classification to the *Available classifications* pane on the left. Use the double left arrow to move *all* the Classifications to the *Available classifications* pane on the left.

Click *OK* to save your changes, or *Cancel* to close the dialog without saving your changes.

11.2.4. Moving A Library Item

In the pane on the right, click on the library item you want to move. Consecutive library items can be selected by selecting the first item, and, while holding down the *Shift* key, selecting the last item in the list. Non-consecutive items can be selected by holding down the *Ctrl* key while clicking on the library items. Drag and drop the selected item(s) to the required location.

Library items can be selected and moved from the pane on the right to a folder in the pane on the left. Library items can also be moved to different folders in the pane on the right.

11.2.4.1. Moving A Library Item With Assigned Categories

Note: Categories are available depending on your PolicyHub system licence.

When moving a library item to a different location, be aware that the category of a document may change by moving it to a different folder. PolicyHub will generate a category assignment warning asking if you wish to keep the current assigned category or change it to the category of the destination folder.

Similarly, if a document or folder has active reviews in progress, a category assignment warning will be displayed, as you cannot move a document or folder while it has an active review in progress.

11.2.5. Editing A Document Revision's Details

Click on the white triangle beside the document to display the document revisions. Select the document revision whose details you want to edit.

Note: You cannot edit the details of document revisions which have been Published.

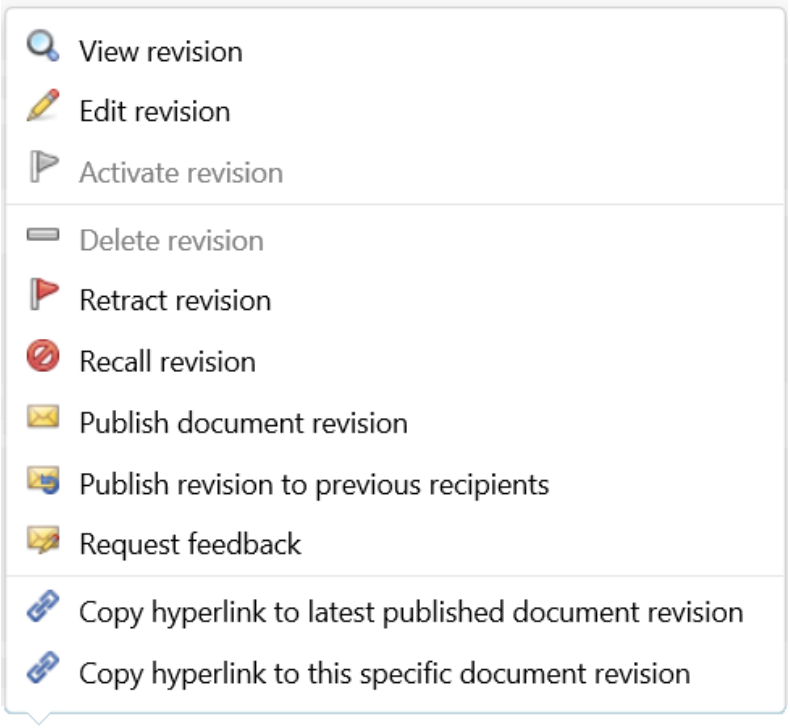
The following fields can be edited:

- *Description* – the maximum length of the description is 99 characters.
- *Version* – The minimum version is *0.01* and the maximum version is *999.99*.

1. Double-click in the cell containing the pencil icon and make the required changes.
2. Click away from the field you are editing to save the changes.

11.2.6. Document Revision Menu

The document revision menu is displayed when you right-click on a document revision.



11.2.6.1. View Revision

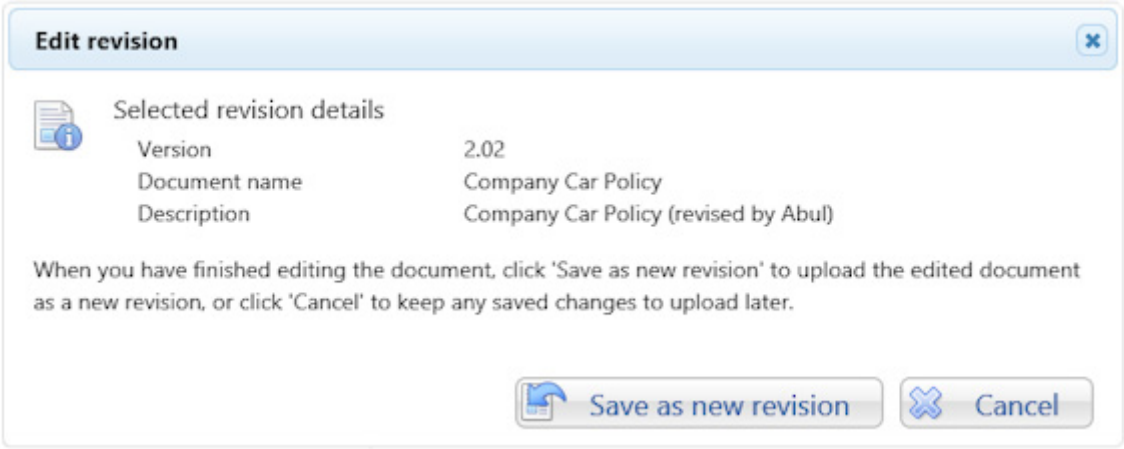
To open the currently selected document revision for viewing, select *View revision*.

- PDF documents are opened in the current window. When you have finished viewing the document, click the *Close* button.
- Microsoft® Office documents are opened in the appropriate Office application. When you have finished viewing the document, close the document.

11.2.6.2. Edit Revision

Right-click a revision of an Office document and select *Edit revision* from the menu. The Document is opened in the appropriate Office application.

Make the required changes to the document. Save and close the document. You are returned to the *Edit latest revision* dialog.



Click the *Save as new revision* button. The *Document description update* dialog is displayed. Enter a revision description for the new revision and click *Save*. The edited document is added to the library as a new revision of the selected Document.

11.2.6.3. Activate Revision

When you select a document and select *Publish document* from the menu, the current *Active* revision of the document is always published. To publish a revision which is *not Active*, expand the document to show all the revisions, select the required revision and select the *Publish document revision* menu option.

Select *Activate revision*. The currently selected document revision is now the active document revision. When the selected document revision is already the active revision, this menu option is dimmed.

The active document revision is displayed in green text.

11.2.6.4. Delete Revision

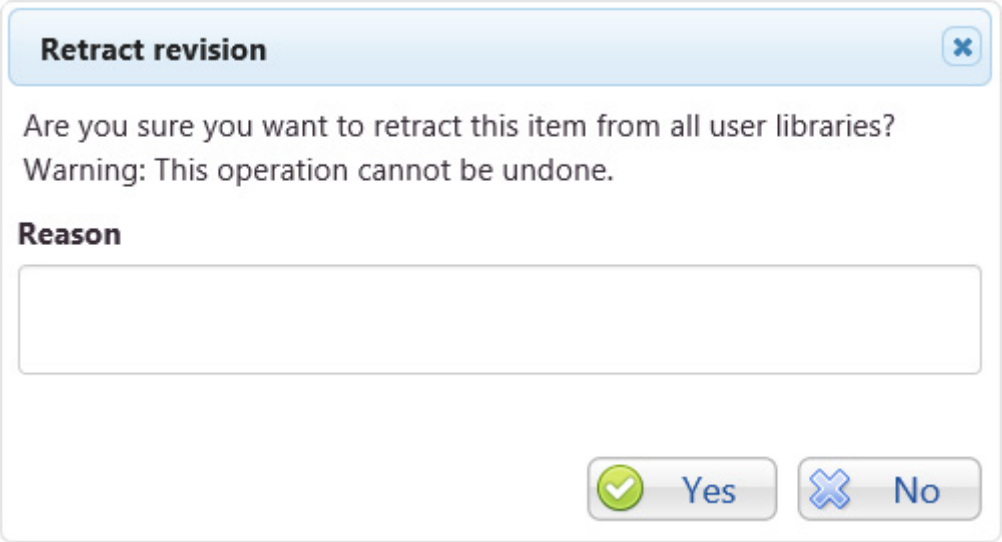
To delete the selected revision, select *Delete revision* from the menu.

You are asked to confirm you want to delete the revision. Click *Yes* to delete the revision or *No* to cancel the deletion.

Note: Only document revisions which have not been Published can be deleted.
If you delete the *Active* revision of a document, the document revision which was uploaded most recently will become the *Active* revision.

11.2.6.5. Retract Revision

Select *Retract revision* when the document revision is no longer relevant. For example, the document revision might have been sent out a number of years ago, but it is no longer required and you want to remove it from the libraries of all the recipients of the document revision. A dialog is displayed.



Enter the reason for retracting the document revision. This reason will be displayed on the *Retracted Documents* page. Click *Yes* to retract the document revision, or *No* to cancel the retraction.

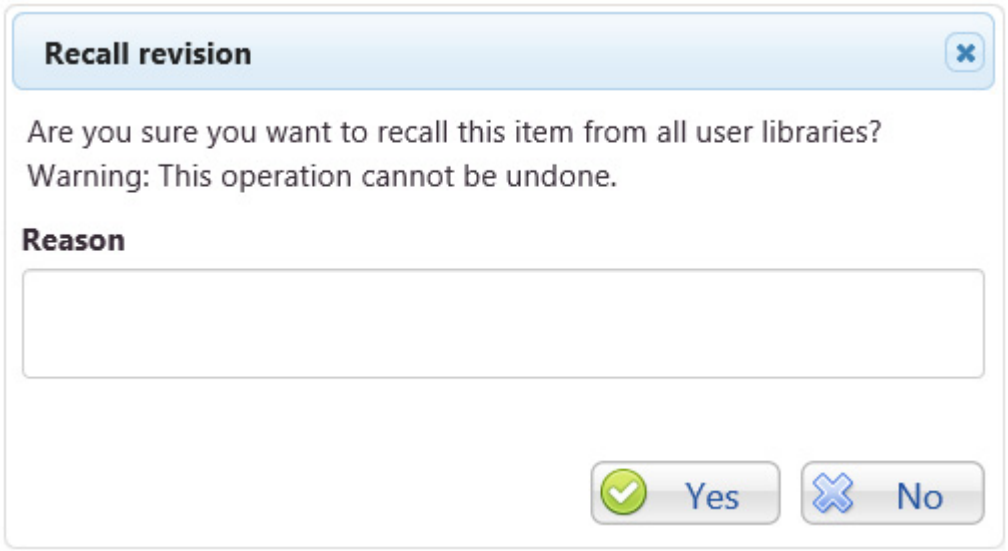
This option *Retract revision* is dimmed for revisions which have not been Published.

To retract *all versions* of a document, see “Retract Document” on page 108.

11.2.6.6. Recall Revision

Select *Recall revision* when the document revision was sent in error and you want the document revision to be removed from the libraries of all its recipients. Only the selected document revision is removed from all user libraries.

A dialog is displayed.



Enter the reason for recalling the document revision. This reason will be displayed on the *Retracted Documents* page. Click *Yes* to recall the document revision, or *No* if you do not want to recall the document revision.

This option *Recall revision* is dimmed for revisions which have not been Published.

To recall *all versions* of a document, see "Recall Document" on page 108.

11.2.6.7. Publish Document Revision

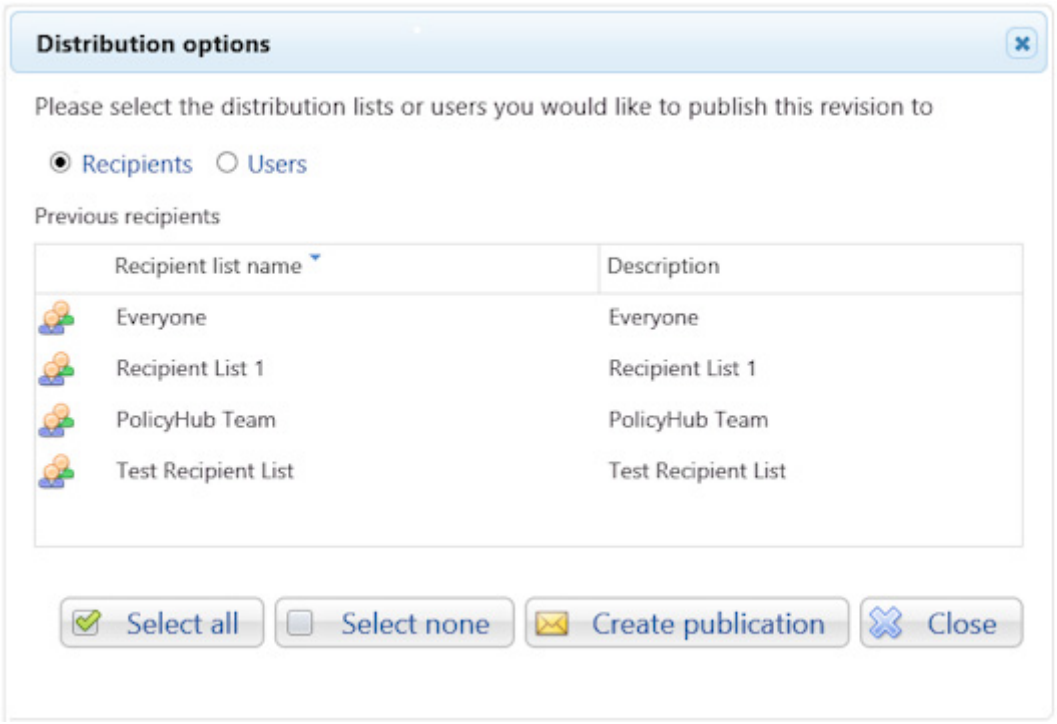
When you want to Publish a specific revision, not necessarily the *Active* document revision, select the revision you want to Publish and select *Publish document revision* from the menu.

This option opens the *Build New Publication* page with the currently selected Document revision added to the *Items to be published* pane. See "Publishing Configuration Examples" on page 53 for examples and "Publishing" on page 284 for a description of all the options on the *Build New Publication* page.

11.2.6.8. Publish Revision To Previous Recipients

When you want to Publish a specific revision to a Recipient List which was used previously when publishing this Document, select *Publish revision to previous recipients* from the menu.

This opens the *Distribution options* dialog.



This dialog displays the Recipients Lists which were used for previous Publications which included this Document. To display individual users, select the *Users* radio button. Users can be sorted by *First name* or *Surname*. Recipient Lists can be sorted by *Recipient list name* or *Description*.

Note: If the Document has been sent for review, the Recipient Lists who received the review are *not* included in the list of Recipients.

11.2.6.8.1. Select All

Click to select all the listed Recipient Lists or Users.

11.2.6.8.2. Select None

Click to de-select all the selected Recipients Lists or Users.

11.2.6.8.3. Create Publication

The *Build New Publication* page is opened with the currently selected Document revision added to the *Items to be published* pane. The selected Recipient Lists or Users are added to the *Intended recipients* pane. If no Recipient Lists or Users are selected, the Publication is created with no recipients in the *Intended recipients* pane. See "Publishing Configuration Examples" on page 53 for examples and "Publishing" on page 284 for a description of all the options on the *Build New Publication* page.

11.2.6.8.4. Close

Click *Close* to return to the library without creating a Publication.

11.2.6.9. Send Document Revision For Review Or Request Feedback

Note: Depending on your PolicyHub system licence, the menu selection displayed will either be "Send Document Revision For Review" or "Request Feedback".

11.2.6.9.1. Send Document Revision For Review

This option sends the selected document revision for review.

This option opens the *Build New Review Publication* page with the currently selected Document revision added to the *Items to be published* pane. See "Publishing Configuration Examples" on page 53 for examples and "Publishing" on page 284 for a description of all the options on the *Build New Review Publication* page.

Note: When a Word document is sent for review, the reviewer can make changes to the Document and add comments. When a PDF document or any other non-Word Document is sent for review, the reviewer cannot make changes to the Document. Instead, all suggested changes must be entered as comments.

11.2.6.9.2. Request Feedback

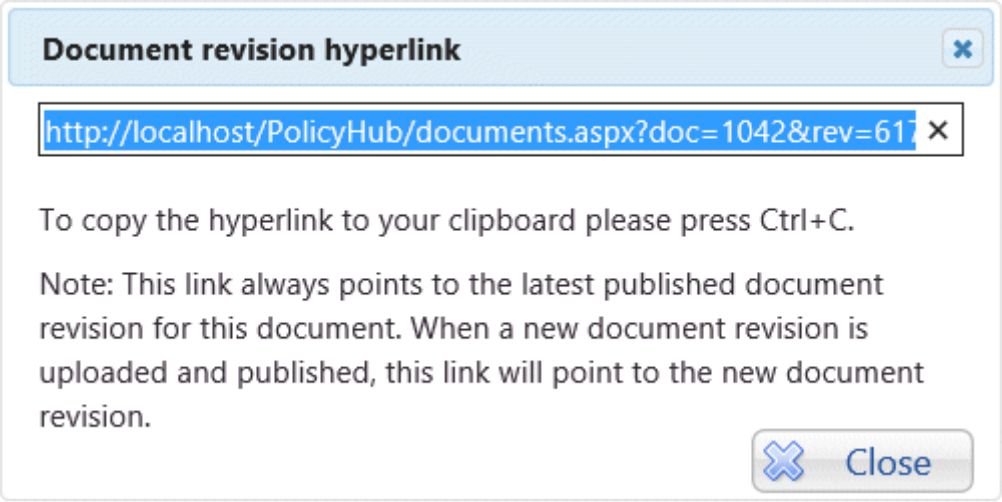
This option opens the *Build New Feedback Request* page with the currently selected Document added to the *Items to include* pane. See "Publishing Configuration Examples" on page 53 for examples and "Publishing" on page 284 for a description of all the options on the *Build New Feedback Request* page.

11.2.6.10. Copy Hyperlink To Latest Published Document Revision

When you are creating a new policy document, you might want to include a hyperlink to the latest Published version of another document. The *Copy hyperlink to latest published document revision* option allows copy a hyperlink and paste it in the appropriate document.

Press *Ctrl+C* to copy the selected link to the clipboard.

Click *Close* to close the dialog box.



Open your document and select an insertion point.

Press *Ctrl+V* on the keyboard to paste the hyperlink into the document. The hyperlink can be renamed in a Word policy document. See "Renaming A Hyperlink (In A Word Document)" for details.

11.2.6.11. Copy Hyperlink To This Specific Document Revision

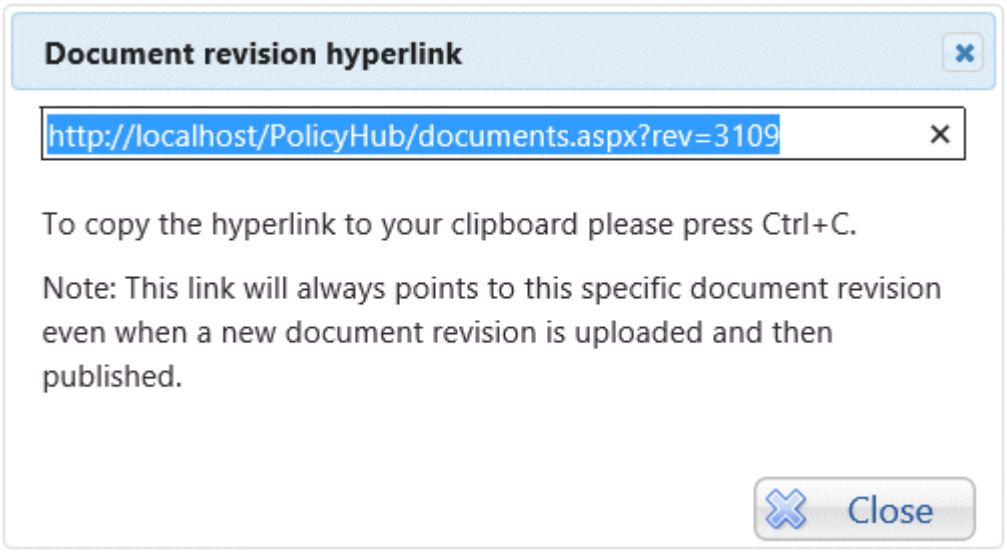
When you are creating a new policy document, you might want to include a hyperlink to a specific revision of another document. The *Copy hyperlink to this specific document revision* option allows you to copy a hyperlink and paste it in the appropriate document.

Note: The *Copy hyperlink to latest published document revision* option will always point to the latest published revision of the linked document.

The *Copy hyperlink to this specific document revision* option will always point to the specific document revision of the linked document.

Press *Ctrl+C* to copy the selected link to the clipboard.

Click *Close* to close the dialog box.



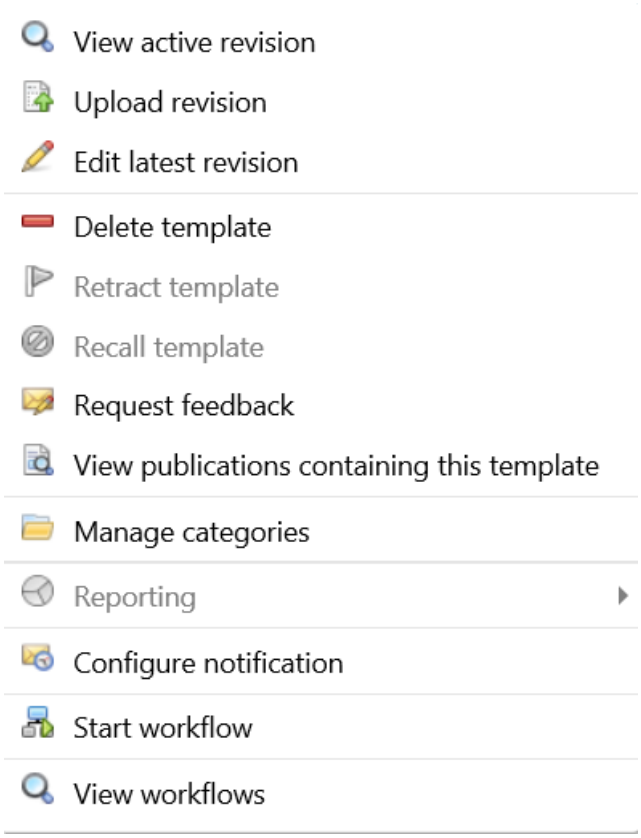
Open your document and select an insertion point.

Press *Ctrl+V* on the keyboard to paste the hyperlink into the document.

The hyperlink can be renamed in Word. See "Renaming A Hyperlink (In A Word Document)" on page 17 for an example.

11.2.7. Template Menu

The Template menu is displayed when you right-click on a Template.



11.2.7.1. View Active Revision

Select *View active revision* from the menu. The active revision of the selected Template is opened for viewing but no changes can be made.

11.2.7.2. Upload Revision

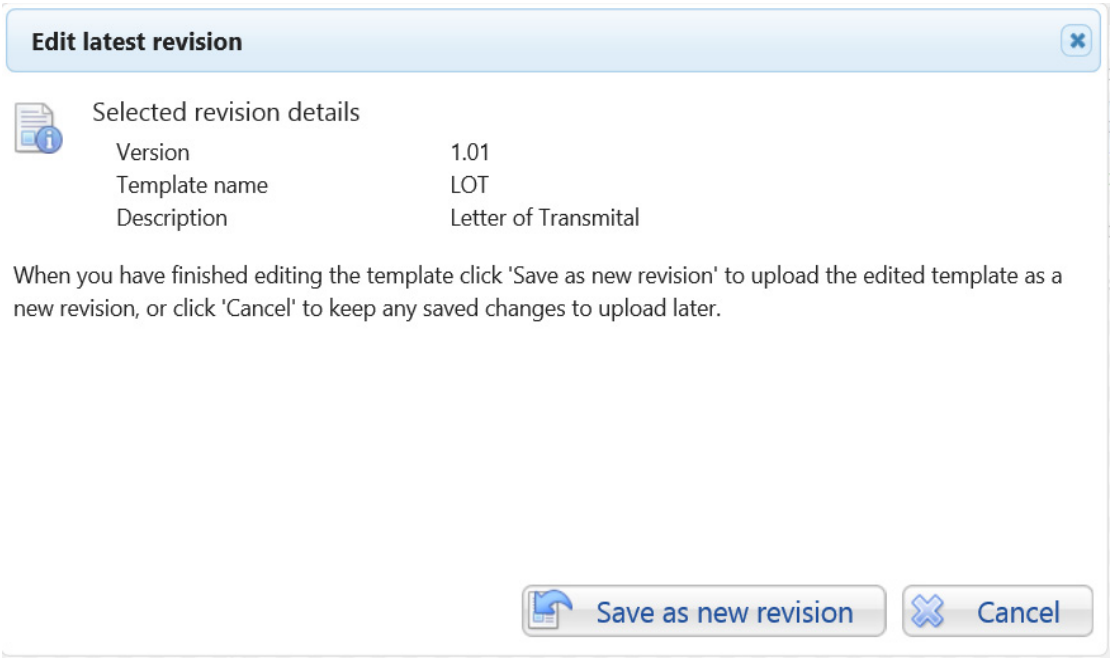
Select *Upload revision* from the menu. A dialog is displayed. Click the *Browse* button and browse to the new revision of the selected Template. Click *Open*. The *Upload revision* dialog is displayed. Enter a revision description in the text box and then click the *Upload* button. The file is uploaded as a new revision of the Template. This new revision appears at the top of the list of template revisions for the selected document and becomes the *Active* revision.

The option *Upload revision* is dimmed for templates which have been Published.

11.2.7.3. Edit Latest Revision

Select *Edit latest revision* from the menu. The latest revision of the Template is opened.

Make the required changes to the Template. Save and close the Template. You are returned to the *Edit latest revision* dialog.



Click the *Save as new revision* button. The *Template description update* dialog is displayed. Enter a revision description for the new revision and click *Save*. The edited Template is added to the library as a new revision of the selected Template.

The option *Edit latest revision* is dimmed for templates which have been Published.

11.2.7.4. Delete Template

To delete the selected template, select *Delete template* from the menu.

You are asked to confirm you want to delete the template. Click *Yes* to delete the template or *No* to cancel the deletion.

The option *Delete template* is dimmed for templates which have been Published.

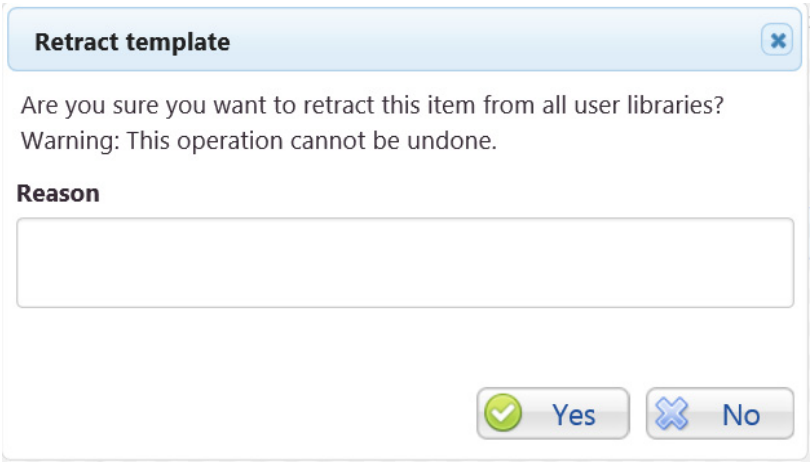
11.2.7.5. Retract Template

Select *Retract template* when the template is no longer relevant.

For example, the template might have been sent out a number of years ago, but it is no longer required and you want to remove it from the libraries of all the recipients of the template. Retracting a *template* removes all version of the template from all the libraries of all recipients.

Note: The template will also be removed from the users Inbox if the template is still there.

A dialog is displayed.



Enter the reason for retracting the template. This reason will be displayed on the *Retracted Templates* page. Click *Yes* to withdraw the template, or *No* to cancel the retraction.

The option *Retract template* is dimmed for templates which have not been Published.

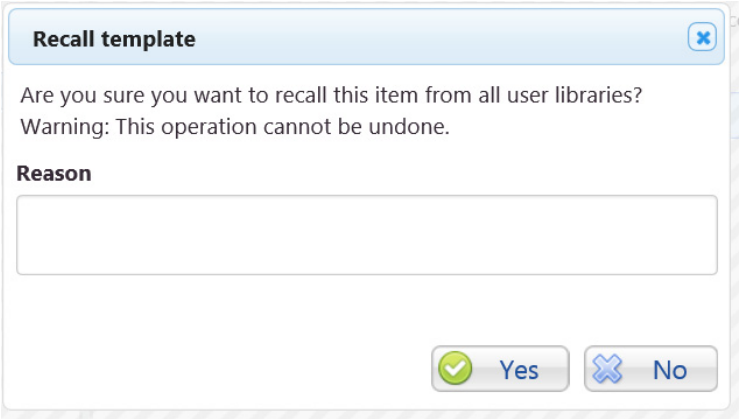
To retract *just a single revision* of the selected template from all user libraries, see ““Retract Revision” on page 137.

11.2.7.6. Recall Template

Select *Recall template* when the template was sent in error and you want the template to be removed from the libraries of all the recipients of the template. Recalling a *template* removes all version of the template from all the libraries of all recipients.

Note: The publication will also be removed from the users Inbox if the template is still there.

A dialog is displayed.



Enter the reason for recalling the template. This reason will be displayed on the *Retracted templates* page. Click *Yes* to recall the template, or *No* if you do not want to recall the template.

The option *Recall template* is dimmed for templates which have not been Published.

To recall *just a single revision* of the selected template from all user libraries, see "Recall Revision" on page 137.

11.2.7.7. Request Feedback

This option opens the *Build New Feedback Request* page with the currently selected template added to the *Items to include* pane. See "Publishing Configuration Examples" on page 53 for examples and "Publishing" on page 284 for a description of all the options on the *Build New Feedback Request* page.

11.2.7.8. View Publications Containing This Template

Select this option to view all the Publications which have been sent which include the selected template. See "Publications List" on page 239.

11.2.7.9. Manage Categories

Refer to "Manage Categories" on page 96 for a description of this menu selection.

Note: Depending on your PolicyHub licence, Categories may not be available in your application software.

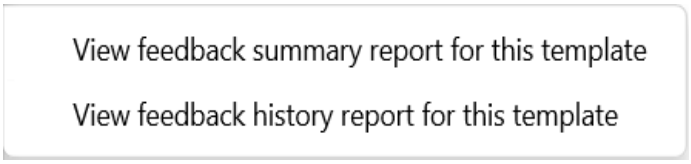
The option *Manage categories* is dimmed for templates which have been Published.

11.2.7.10. Reporting

In the PolicyHub library, you can investigate feedback summary reports and feedback history reports for templates in a selected folder.

The option *Reporting* is dimmed for templates which have not been Published.

Right-click on a folder in the PolicyHub library and select *Reporting*.



When selected, each menu item will generate a report.

Note: A report toolbar is displayed on each report. See “Report Toolbar” on page 363 for a description of the toolbar.
Each report includes a *Filters* tab which displays or hides filters which can be used to refine the report. For more information about adding and or changing filtering options, see “Date Filters” on page 371, “Additional Filtering Options” on page 372 and “Changing the Default Filtering Option” on page 373.
Each report also has the capability to sort data within each column. For more information See “Sorting Report Data Within Columns” on page 376.
The reports also include a *Fields* tab which displays or hides fields which can also be used to refine the report. For more information see “Adding/Removing Columns From Reports” on page 376. Large reports contain a tool bar to navigate between report pages. For more information See “Report Pagination” on page 377.
The *Subscribe* button enables the User to create a report subscription. For more information see “Creating Subscriptions” on page 380.

11.2.7.10.1. View Feedback Summary Report For This Template

The Feedback Summary Report shows a summary of the selected template.

Displaying report for item 'Memo' in all feedback requests

Library Item	Description	Added By	Last Edited By	Folder	Current Version	Current Active Version	Date Last Sent For Feedback	Date Last Feedback Completed	Next Feedback Reminder
Memo	Company Memo Template	Peter Beard	Peter Beard	Templates	1.01	1.01	12/04/2017 10:57		

The column headings in the above report are described in Table 12.

TABLE 12. Feedback Summary Report

Item	Description
Library Item	The name of the selected Template. Active Link. Click to see a *Review History* report for the selected item. For more information, see “View Review History Report For This Document.” on page 120.
Description	The name of the Template located in the selected Folder.
Added By	The name of the person who uploaded or edited this version of the Template.
Last Edited By	The name of the person who last changed this version of the Template.
Folder	The name of the folder in which the Template is located. Active Link. Click to see the Template located in the selected Folder. See “Folder View Options” on page 93 for more information.

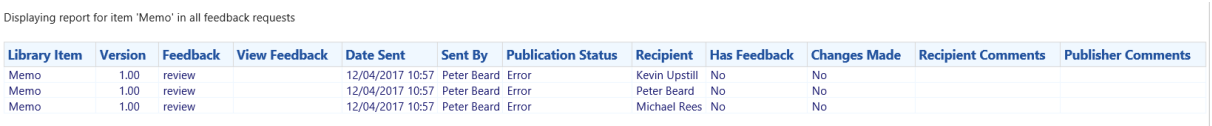
TABLE 12. Feedback Summary Report

Item	Description
Current Version	The version of the Template located in the selected Folder.
Current Active Version	The latest active version of the Template located in the selected Folder.
Date Last Sent For Feedback	The date the Template (located in the selected Folder) was last sent for review.
Date Last Feedback Completed	The date the Template (located in the selected Folder) was last reviewed.
Next Feedback Reminder	The date the next review email for the Template (located in the selected Folder) will be sent.

Click *Close* to return to the folder containing the selected template.

11.2.7.10.2. View Feedback History Report For This Template

The Feedback History Report shows the history of the selected template.



Displaying report for item 'Memo' in all feedback requests

Library Item	Version	Feedback	View Feedback	Date Sent	Sent By	Publication Status	Recipient	Has Feedback	Changes Made	Recipient Comments	Publisher Comments
Memo	1.00	review		12/04/2017 10:57	Peter Beard	Error	Kevin Upstill	No	No		
Memo	1.00	review		12/04/2017 10:57	Peter Beard	Error	Peter Beard	No	No		
Memo	1.00	review		12/04/2017 10:57	Peter Beard	Error	Michael Rees	No	No		

The column headings in the above report are described in Table 13

TABLE 13. Feedback History Report

Item	Description
Library Item	The name of the selected template.
Version	The version of the reviewed template.
Review	The name of the reviewed template.
View Feedback	Active Link. Click the underlined *View* text link to inspect the reviewed template.
Date Sent	The date the reviewed template was sent.
Sent By	The name of the person who sent the template.

TABLE 13. Feedback History Report

Item	Description
Publication Status	Templates have the status *Completed* when: • They have been complied with by all recipients. • The rule used for template has expired. • They were Published directly into user library. Templates are *Active* when there are outstanding Templates to be complied with and the rule has not expired. Templates have the status *Error* when they weren't sent because of an error. Templates have the status *Retracted* when the Template was *Retracted*. Templates have the status *Recalled* when the Template was *Recalled*.
Recipient	The name of the person who received the Template.
Has Feedback	Indicates whether the Template was reviewed. Yes - has been reviewed. No - has not been reviewed.
Changes Made	Indicates whether changes have been made. Yes - changes have been made. No - changes have not been made.
Recipient Comments	Optional (helpful) comments added by the person who received the Template.
Publisher Comments	Optional (helpful) comments added by the person who published the review Template.

Click *Close* to return to the folder containing the selected template.

11.2.7.11. Configure Notification

The notification configuration settings are the same as those described in "Configure Review Schedule".

11.2.7.12. Start Workflow

Note: Depending on your PolicyHub licence, Workflow may not be available in you application software.

Refer to "Start Workflow" on page 128 for a description of this menu selection.

The option *Start workflow* is dimmed for templates which have been Published.

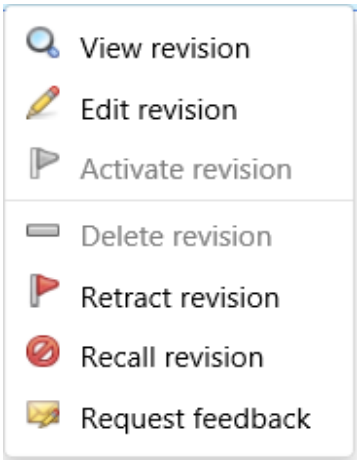
11.2.7.13. View Workflows

Note: Depending on your PolicyHub licence, Workflows may not be available in you application software.

Refer to "View Workflows" on page 129 for a description of this menu selection.

11.2.8. Template Revision Menu

The template revision menu is displayed when you right-click on a Microsoft® Word template.



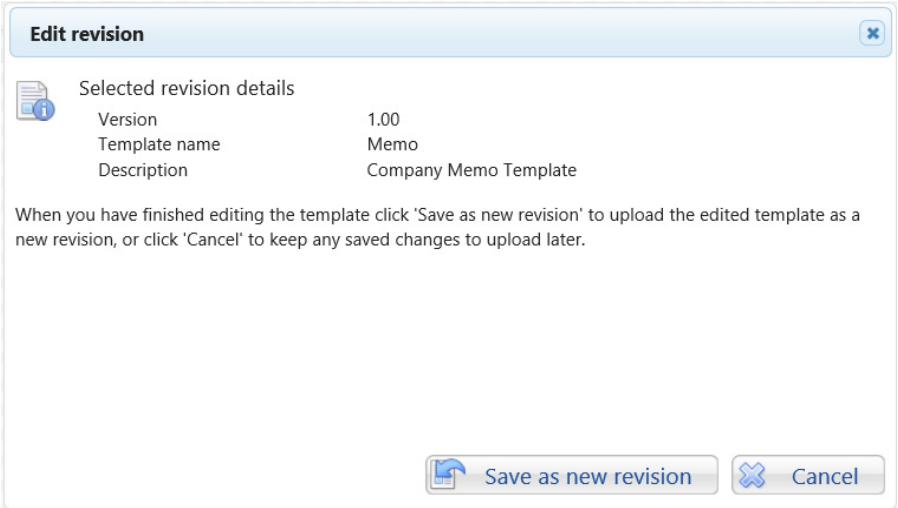
11.2.8.1. View Revision

To open the currently selected template revision for viewing, select *View revision*. The template is opened in Microsoft® Word. When you have finished viewing the template, close the template.

11.2.8.2. Edit Revision

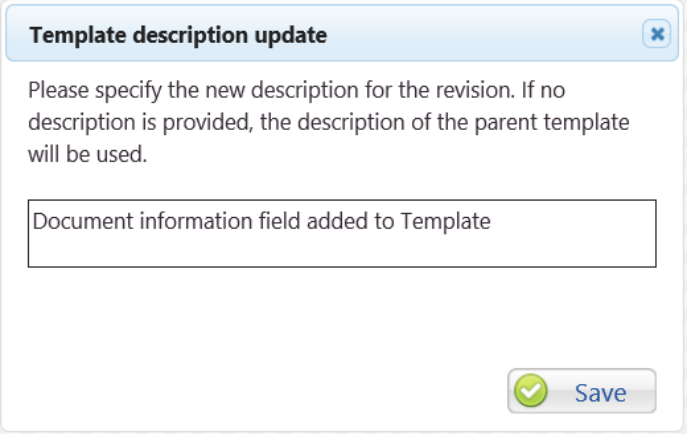
Right-click a revision of the Word Template and select *Edit revision* from the menu. The template is opened in Microsoft® Word.

Make the required changes to the template. Save and close the template. You are returned to the *Edit revision* dialog.



Note: Clicking the *Cancel* button in the *Edit revision* dialog will let you save the changes to upload later or alternatively discard the changes. If you save the changes they will be available the next time you edit the revision of the template, but they won't be visible to any other users until the they are uploaded as a new revision. If you discard the changes they will be lost.

Click the *Save as new revision* button in the *Edit revision* dialog to save your changes as a new revision. The *Template description update* dialog is displayed.



Enter a revision description for the new revision and click *Save*. The edited template is added to the library as a new revision of the selected Template.

11.2.8.3. Activate Revision

When you select a template and select *Activate revision* from the menu, it becomes the current *Active* revision. To publish a revision which is *not Active*, select the required revision and select the *Activate revision* from the menu option. The currently selected template revision is now the active template revision.

When the selected template revision is already the active revision, this menu option is dimmed.

The active template revision is displayed in green text.

11.2.8.4. Delete Revision

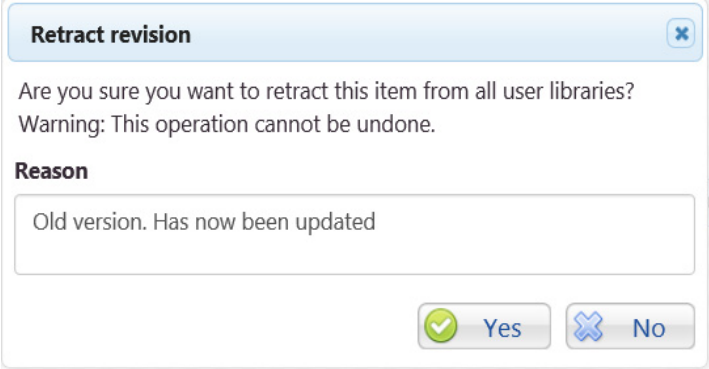
To delete the selected revision, select *Delete revision* from the menu.

You are asked to confirm you want to delete the revision. Click *Yes* to delete the revision or *No* to cancel the deletion.

Note: Only template revisions which have not been Published can be deleted.
If you delete the *Active* revision of a template, the template revision which was uploaded most recently will become the *Active* revision.

11.2.8.5. Retract Revision

Select *Retract revision* when the template revision is no longer relevant. For example, the template revision might have been sent out a number of years ago, but it is no longer required and you want to remove it from the libraries of all the recipients of the template revision. A dialog is displayed.



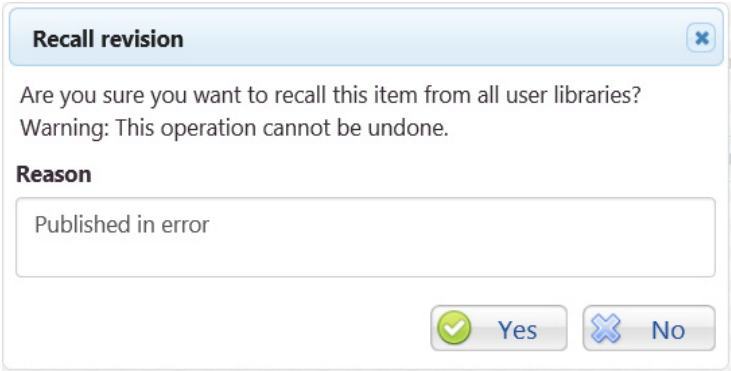
Enter the reason for retracting the template revision. This reason will be displayed on the *Retracted Templates* page. Click *Yes* to retract the template revision, or *No* to cancel the retraction.

This option *Retract revision* is dimmed for revisions which have not been Published.

11.2.8.6. Recall Revision

Select *Recall revision* when the template revision was sent in error and you want the template revision to be removed from the libraries of all its recipients. Only the selected template revision is removed from all user libraries.

A dialog is displayed.



Enter the reason for recalling the template revision. This reason will be displayed on the *Retracted Templates* page. Click *Yes* to recall the template revision, or *No* if you do not want to recall the template revision.

This option *Recall revision* is dimmed for revisions which have not been Published.

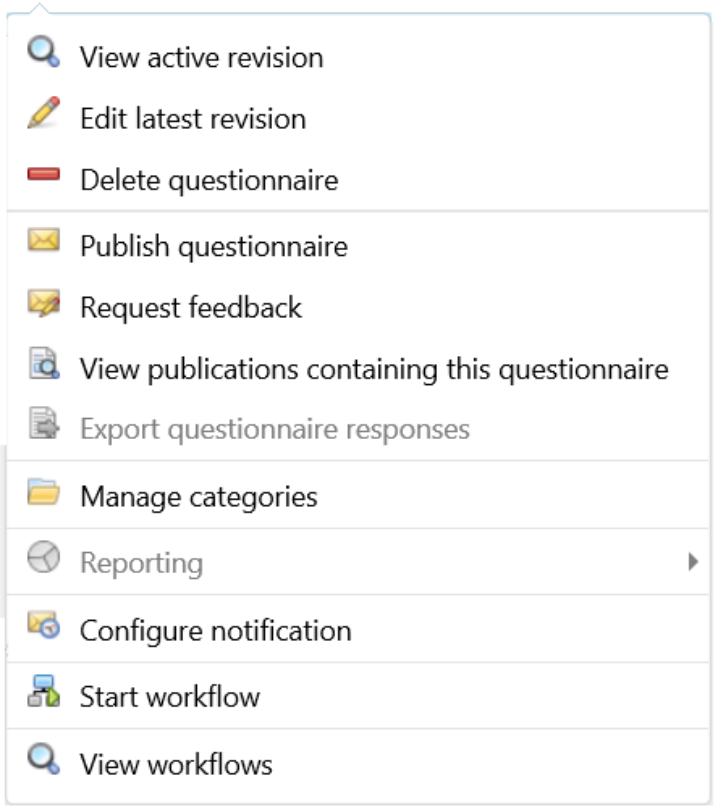
11.2.8.7. Request Feedback

This option opens the *Build New Feedback Request* page with the currently selected template added to the *Items to include* pane. See “Publishing Configuration Examples” on page 53 for

examples and “Publishing” on page 284 for a description of all the options on the *Build New Feedback Request* page.

11.2.9. Questionnaire Menu

The Questionnaire menu is displayed when you right-click on a Questionnaire.

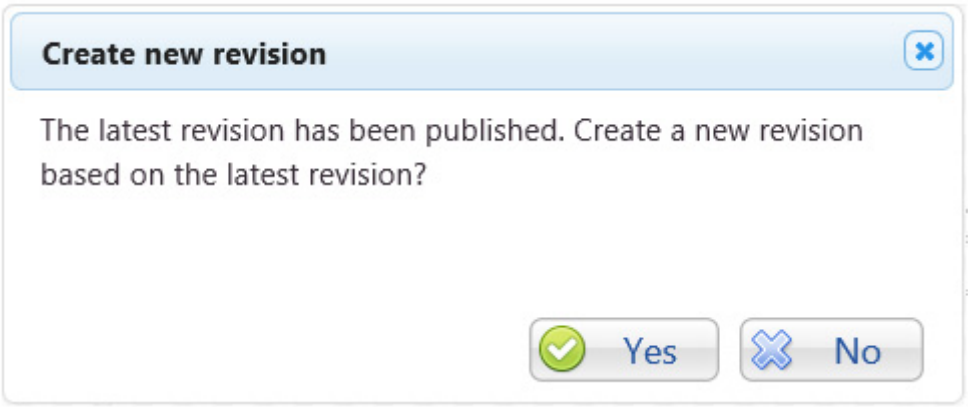


11.2.9.1. View Active Revision

Select *View active revision* from the menu. The active revision of the selected Questionnaire is opened for viewing but no changes can be made.

11.2.9.2. Edit Latest Revision

- When the latest revision has already been Published, the following dialog is displayed.



  - Click *Yes* to create a new revision of the selected Questionnaire, based on the latest revision, and open it for editing.

- Click *No* to cancel the edit.

- When the latest revision has not yet been Published, the latest revision of the selected Questionnaire is opened for editing.

11.2.9.3. Delete Questionnaire

This option is available for unpublished Questionnaires only.

Select this option to delete the Questionnaire.

11.2.9.4. Publish Questionnaire

Select this option to open the *Build New Publication* page with this Questionnaire added to the list of *Items to be published*. See "Publishing Configuration Examples" on page 53 for examples.

11.2.9.5. Send Questionnaire For Review or Request Feedback

Note: Depending on your PolicyHub system licence, the menu selection displayed will either be "Send Questionnaire For Review" or "Request Feedback".

11.2.9.5.1. Send Questionnaire For Review

This option opens the *Build New Review Publication* page with the currently selected Questionnaire added to the *Items to be published* pane. See "Publishing Configuration Examples" on page 53 for examples and "Publishing" on page 284 for a description of all the options on the *Build New Review Publication* page.

A Questionnaire is converted to a Word document before it is sent for Review.

11.2.9.5.2. Request Feedback

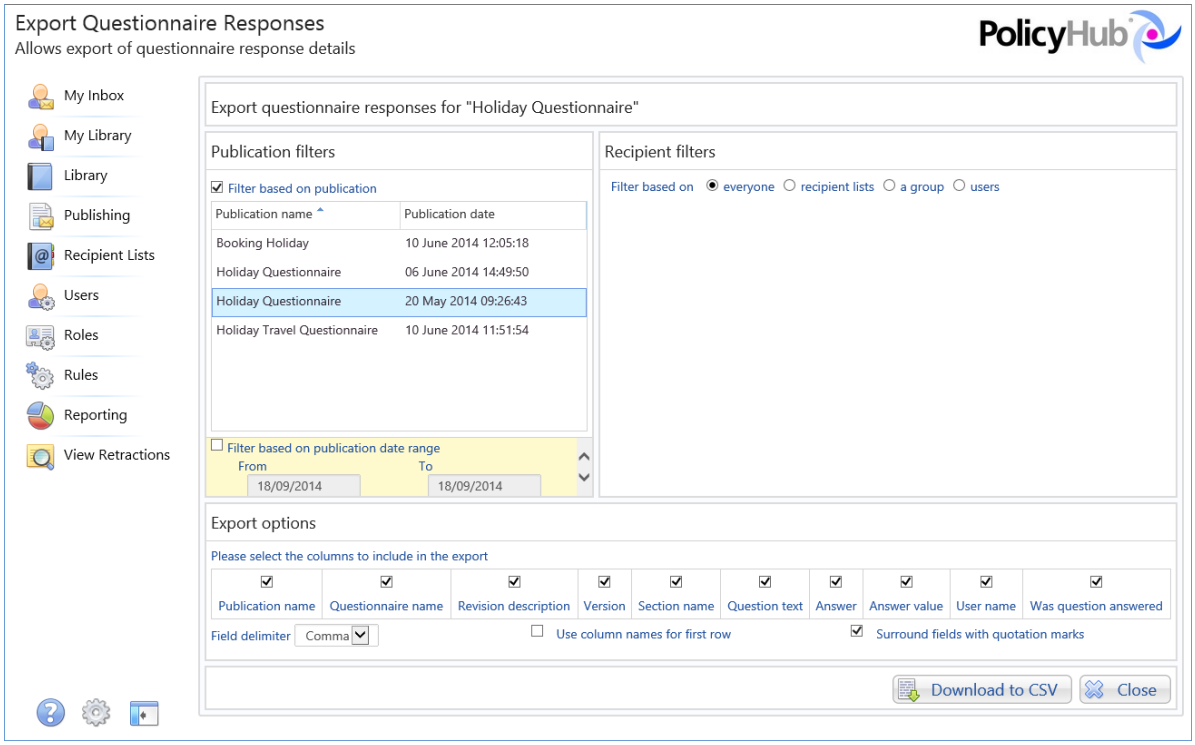
This option opens the *Build New Feedback Request* page with the currently selected Questionnaire added to the *Items to include* pane. See "Publishing Configuration Examples" on page 53 for examples and "Publishing" on page 284 for a description of all the options on the *Build New Feedback Request* page.

11.2.9.6. View Publications Containing This Questionnaire

This option displays all the Publications which were used to send this Questionnaire. See "View Publications Containing This Document" on page 109 for details.

11.2.9.7. Export Questionnaire Responses

Select *Export questionnaire responses* to export the responses to the selected Questionnaire based on Publication, Users or date the Publication was sent. The responses are exported to a CSV file.



11.2.9.7.1. Publication Filters

To export the answers from a single Publication, clear *Filter based on publication date range* (if selected) and select *Filter based on publication* and select the Publication whose responses you want to export.

To export the answers for all Publications sent on a specified date or during a period of time, clear *Filter based on publication* and select *Filter based on publication date range*. Select the *To* date and the *From* date to define the date range of when the Publications were sent.

If you select both *Filter based on publication* and *Filter based on publication date range*, the CSV file will contain only those responses from the selected Publications which were Published in the date range.

11.2.9.7.2. Recipient Filters

To export the answers returned by the specified Users, clear *Filter based on publication date range* and select a *Recipient filter:*

recipient lists – select one or more of the listed Recipient Lists.

a group – select the Group from the displayed tree.

users – select the Users from those listed. Consecutive Users in the list can be selected by selecting the first User, and, while holding down the *Shift* key, selecting the last User in the list. Non-consecutive Users can be selected by holding down the *Ctrl* key while clicking on the Users. The list of Users can be filtered by entering a filter in the *Filter user list...* text box (below the list of Users).

Note: You cannot select a *Recipient filter* if the selected Questionnaire has been Published with the option *Anonymous*, or *Optionally anonymous*.

Note: If, when you look at the exported responses, there is less data than you expected, check you have cleared the filters you do not require.

11.2.9.7.3. Export Options

Select the columns you want to export. The column headings are described in Table 14.

TABLE 14. Export Questionnaire Responses – Columns To Include

Item	Description
Publication name	The name of the Publication used to send the Questionnaire containing the response which is being exported.
Questionnaire name	The name of the Questionnaire containing the response which is being exported.
Revision description	The revision description given to the Questionnaire containing the response which is being exported.
Version	The version of the Questionnaire containing the response which is being exported.
Section name	The name of the section containing the question whose response is being exported.
Question text	The question whose response is being exported.
Answer	The response being exported. For a rating scale response or a selection response, this is the text for the answer selected. For an input answer, this is the text the user typed in the text box.
Answer value	For non-rating scale answers, this is always 0. For a rating scale answer, the value of the rating. For the default rating scales, 1 is the most negative response (that is Poor, Never, Strongly Disagree, Extremely Unlikely, Not Important) and 5 is the most positive response (Excellent, Frequently, Strongly Agree, Extremely Likely, Very Important).
User name	The name of the User responding to the question. When the Questionnaire was sent with the option *Anonymous*, or *Optionally anonymous,* names are replaced with *AnonymousUser[1]*, *AnonymousUser[2*] etc.
Was question answered	1 – yes, the question was answered. 0 – no, the question was not answered.

By default, all of the columns are selected (ticked).

Use column names for first row – select this option to have the selected column names (listed in the table above) as the first row of the CSV file. By default, this option is cleared which exports the responses without the column names.

Field delimiter – select either *Comma* or *Tab* from the drop-down list. The selected delimiter will be used to separate each field in the CSV file.

Surround fields with quotation marks – If any of the information fields to be exported are likely to contain commas or tabs, these will also be exported to the file and may confuse some applications (e.g. Excel). In order to avoid this, select *Surround fields with quotation marks*. This ensures that third party applications do not confuse the contents of text fields with the delimiters used to separate them. When selected, each field value is surrounded by quotation mark. When *Surround fields with quotation marks* is cleared, quotation marks are not used.

Note: When a CSV file is opened with Excel, the quotation marks might not be displayed.

Click the *Download to CSV* button to export the Questionnaire responses with the selected filters and options applied. Depending on the browser you are using, you might be prompted to save or open the CSV file, or the CSV file might be opened automatically for you. The CSV file is downloaded to your Downloads folder.

Note: Responses are sorted alphabetically by question when they are exported.

To close the *Export Questionnaire Responses* page, click the *Close* button.

11.2.9.8. Manage Categories

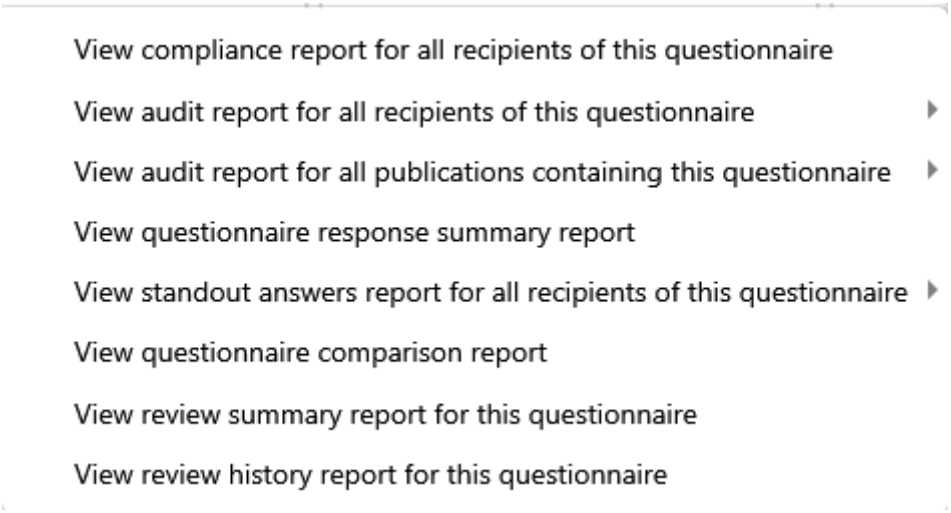
Refer to "Manage Categories" on page 96 for a description of this menu selection.

Note: Depending on your PolicyHub licence, Categories may not be available in your application software.

11.2.9.9. Reporting

In the PolicyHub library, you can investigate the responses to a Questionnaire by Publication, Date Range (from when the Questionnaire was sent), Recipient List, Group, Users, open a *Response Summary Report* to display a graphical (bar chart) view of the responses, or open a *Standout Answers* report and view a questionnaire comparison report.

Right-click on a *Questionnaire* in the PolicyHub library and select *Reporting*. The following menu is displayed.



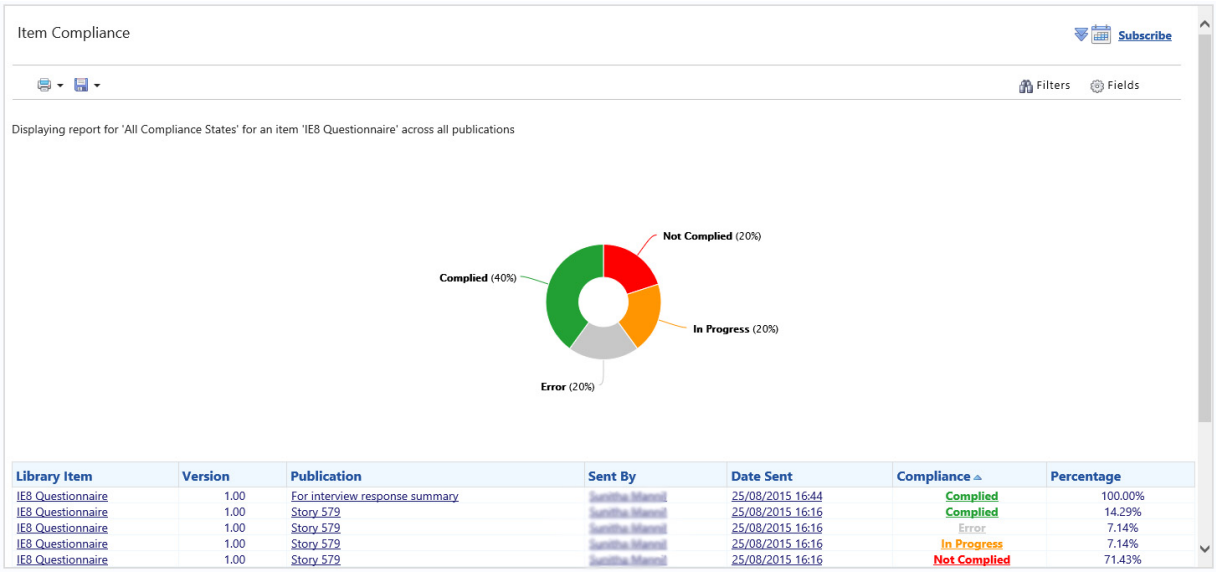
When selected, each menu item will generate a report.

To investigate in more detail, click on any of the active links (underlined text) in the report.

Note: A report toolbar is displayed on each report. See “Report Toolbar” on page 363 for a description of the toolbar.
Each report includes a *Filters* tab which displays or hides filters which can be used to refine the report. For more information about adding and or changing filtering options, see “Date Filters” on page 371, “Additional Filtering Options” on page 372 and “Changing the Default Filtering Option” on page 373.
Each report also has the capability to sort data within each column. For more information See “Sorting Report Data Within Columns” on page 376.
The reports also include a *Fields* tab which displays or hides fields which can also be used to refine the report. For more information see “Adding/Removing Columns From Reports” on page 376. Large reports contain a tool bar to navigate between report pages. For more information See “Report Pagination” on page 377.
The *Subscribe* button enables the User to create a report subscription. For more information see “Creating Subscriptions” on page 380.

11.2.9.9.1. View Compliance Report For All Recipients Of This Questionnaire

This report displays a chart for the selected Questionnaire showing the different versions published and whether they were *Complied*, *In Progress*, *Not Complied* or in *Error.*



Note: *No report data* is displayed when a Questionnaire has been published with the *Questionnaire submission type* set to *Anonymous* or *Optionally anonymous.*

The column headings in the above report are described in Table 15.

TABLE 15. Item Compliance Report

Item	Description
Library Item	The name of the Document, Questionnaire or Test you right-clicked in the library. Active Link. Click to display the Item Compliance report for the selected library item for all Publications.
Version	The version of the document which was included in the Publication.
Publication	The name of the Publication this version of the document was published with, on the date shown. Active Link. Click to display the Item Compliance report for the selected Document, Questionnaire or Test for the selected Publication only.
Sent By	The name of the person who published this version of the document on the date shown. Active Link. Click to see the *Publication Compliance* report for the selected user. See "Publication Compliance Report" on page 364 for more information.

TABLE 15. Item Compliance Report

Item	Description
Date Sent	The date the Publication was sent. Active Link. Click to see the Publication Compliance report for all Publications sent on the selected date. See "Publication Compliance Report" on page 364 for more information.
Compliance	The compliance status (Complied, In Progress, Not Complied or in Error) of this Document. Active Link. Click to display the *User Action* report for the selected users and the selected Compliance Status. See "View Compliance Report Based On This User And The Selected Publication" on page 270 for more information.
Percentage	The percentage of recipients of the Publication with the compliance state shown.
Publication Status (Hidden by default)	Publications have the status *Completed* when: • They have been complied with by all recipients. • The rule used for Publication has expired. • They were Published directly into user library. Publications are *Active* when there are still some outstanding publications to be complied with and the rule has not expired. Publications have the status *Error* when they weren't sent because of an error. Publications have the status *Retracted* when the Publication was *Retracted*. Publications have the status *Recalled* when the Publication was *Recalled*.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

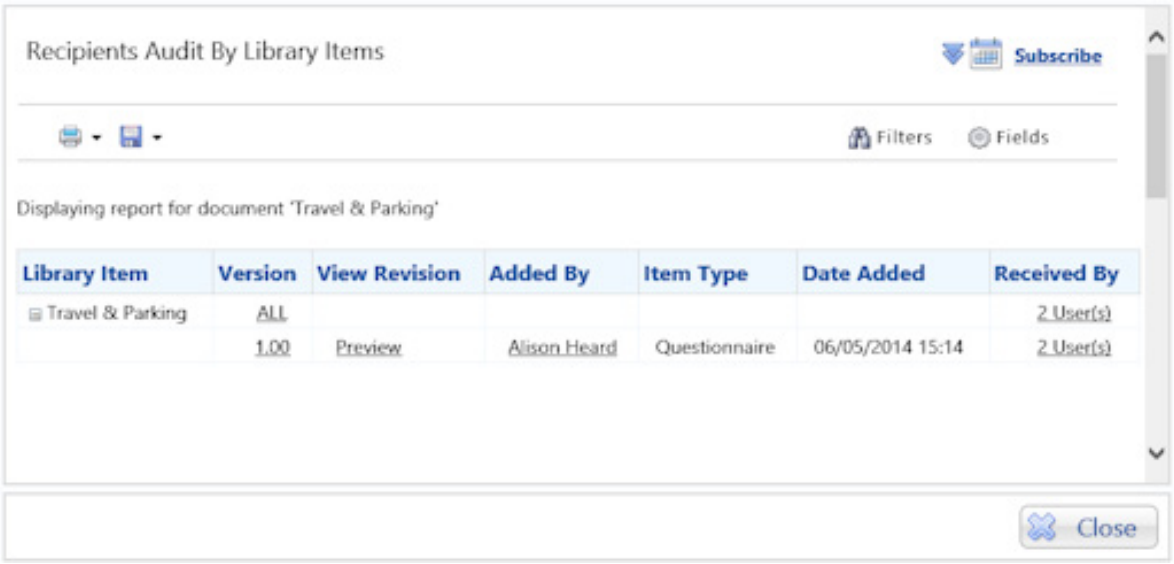
Click *Close* to return to the folder containing the selected document.

11.2.9.9.2. View Audit Report For All Recipients Of This Questionnaire

From the selected menu item, select one of the following sub-menu options:

- *Across all dates* – shows the report with no date filter.
- *For a specific date range* – shows the report for Publications containing this Questionnaire which were sent on the days specified only.

This report shows the number of recipients of each version of the selected Questionnaire.



The column headings in the above report are described in Table 16.

TABLE 16. Recipients Audit By Library Items Report

Item	Description
Library Item	The name of the questionnaire you right-clicked in the library.
Version	The version of the questionnaire that was edited by the person shown. Active Link. Click on a questionnaire version to display the *Library Item Audit By Recipients* report for the selected questionnaire version. See "Library Item Audit By Group Report" on page 318 for more information.
View Revision	Active Link. Click *Preview* to preview the selected questionnaire revision.
Added By	The name of the person who uploaded or edited this version of the questionnaire. Active Link. Click to open the *User Information* report for the selected user. Report. See "User Information Report" on page 121 for information.
Item Type	Questionnaires have the Item Type *Questionnaire*.
Date Added	The date and time this version of the questionnaire was uploaded.
Received By	The number of recipients of the version of the questionnaire. Active Link. Click on a number in the *Received By* column to display the *Library Item Audit By Recipients* report for the users who received the selected questionnaire version. See "Library Item Audit By Group Report" on page 318 for more information.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

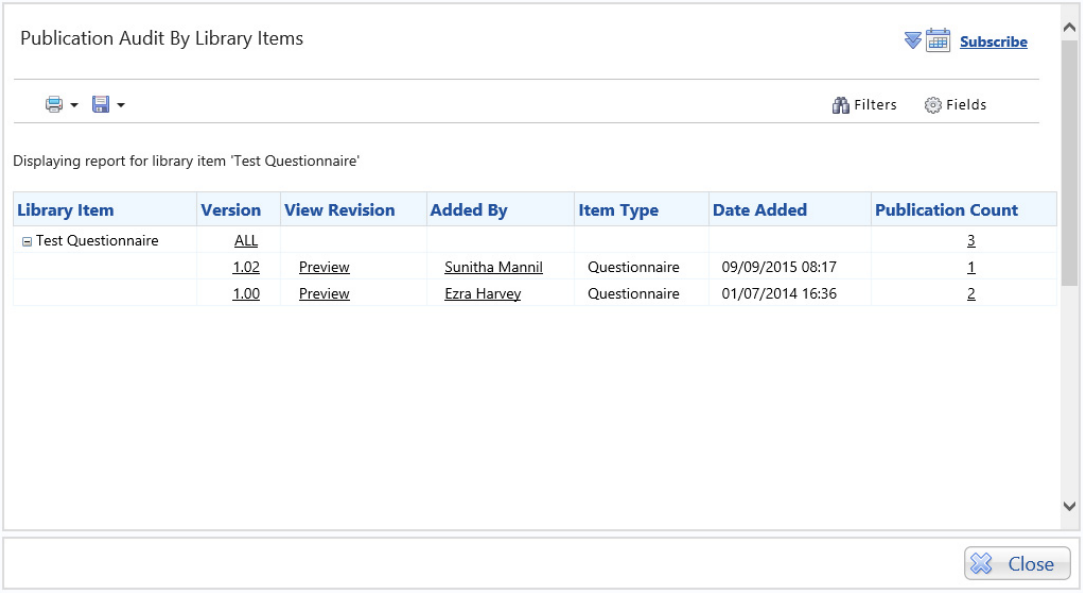
Click *Close* to return to the folder containing the selected document.

11.2.9.9.3. View Audit Report For All Publications Containing This Questionnaire

From the selected menu item, select one of the following sub-menu options:

- *Across all dates* – shows the report with no date filter.
- *For a specific date range* – shows the report for Publications containing this Questionnaire which were sent on the days specified only.

This report shows the number of times each version of the selected item was published.



The column headings in the above report are described in Table 17.

TABLE 17. Publication Audit By Library Items Report

Item	Description
Library Item	The name of the Document, Test or Questionnaire you right-clicked in the library.
Version	The version of the Document, Test or Questionnaire that was *Added by* the person shown. Active Link. Click the version to display the *Library Item Audit By Publication* report for the selected Library Item version. See "Library Item Audit By Publication Report" on page 255 for more information.
View Revision	Active Link. Click *View* to view the selected Document revision or *Preview* to preview the selected Test or Questionnaire revision.

TABLE 17. Publication Audit By Library Items Report

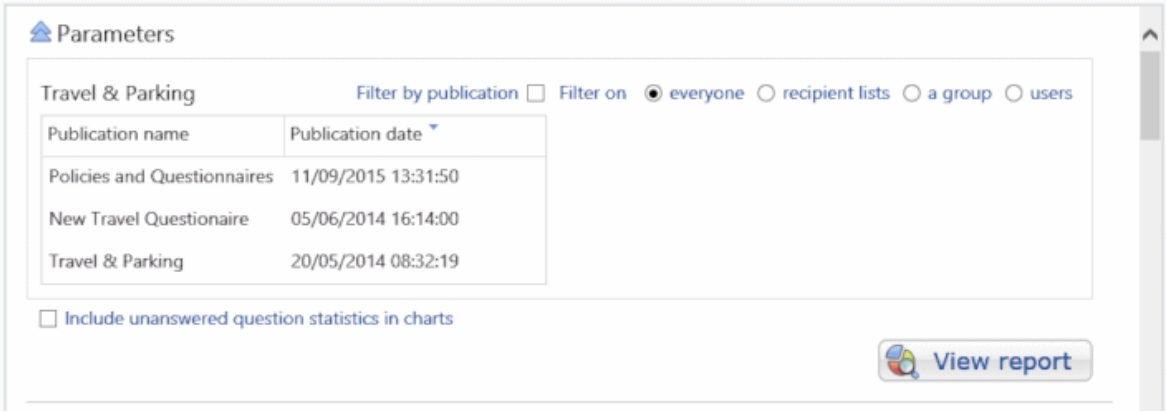
Item	Description
Added By	The name of the person who uploaded or edited this version of the Document, Questionnaire or Test. Active Link. Click to open the *User Information* report for the selected user. Report. See "User Information Report" on page 121 for information.
Item Type	A Policy Document has the document type *Document*. A Questionnaire has the document type *Questionnaire*. A Test has the document type *Test*.
Date Added	The date and time this version of the Document, Questionnaire or Test was uploaded.
Publication Count	The number of times the version of the Document, Test or Questionnaire was published. Active Link. Click the Publication Count to display the *Library Item Audit By Publication* report for the Publications included in the selected Publication Count. See "Library Item Audit By Publication Report" on page 255 for more information.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click *Close* to return to the folder containing the selected document.

11.2.9.9.4. View Questionnaire Response Summary Report

In the Summary Report's *Parameters* section, you can filter by Publication, Date (from when the Questionnaire was sent), Everyone, Recipient Lists, Group and Users.



Select *View report* to open a *Response Summary Report* which will display a graphical (bar chart) view of the responses.

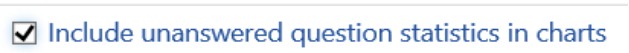
The report's statistics are displayed in the main *Interview Response Summary* page.

Note: By default, the chart will *not show* a *results bar* for people who viewed the question but did not answer.

By default, the *Response Summary Report* displays 10 questions per page. If there are more than 10 questions in a report, a navigation tool bar is displayed at the bottom left of the page to navigate forward or backwards between pages. In the example below there are 11 questions in 2 pages in the *Response Summary Report*.

11.2.9.9.4.1. Not Answered

To include statistics on people who viewed the question but did not answer, select the *Include unanswered question statistics in charts* tick-box (in the parameters section) then click the *View report* button.

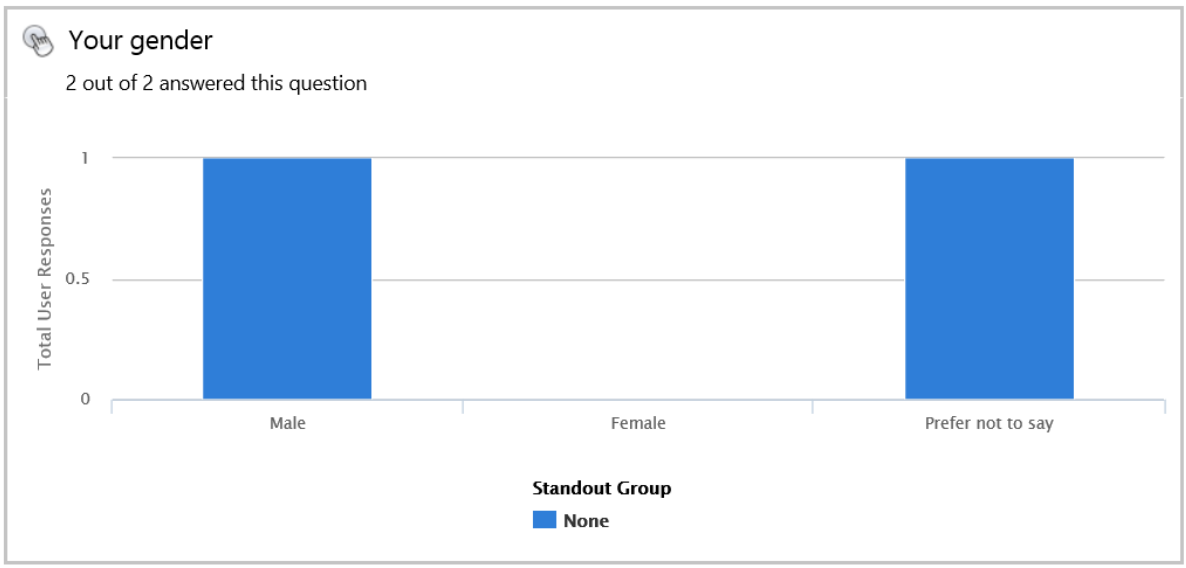


With the *Include unanswered question statistics in charts* tick-box selected unanswered results are shown.

Note: If a person does not view a question (due to branching or skipping to the end), they will not be included in the statistics for that question.

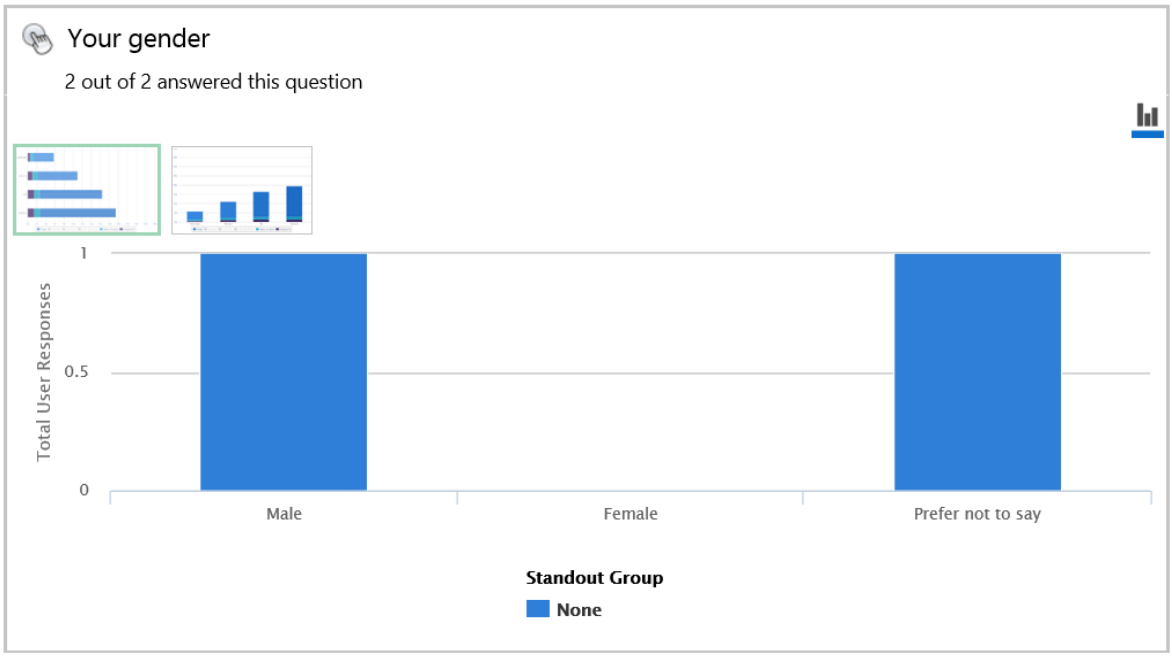
11.2.9.9.4.2. Questionnaire Response Graph Style

The default for the questionnaire response graph style is a vertical display as shown in the 'Your gender? graph below.



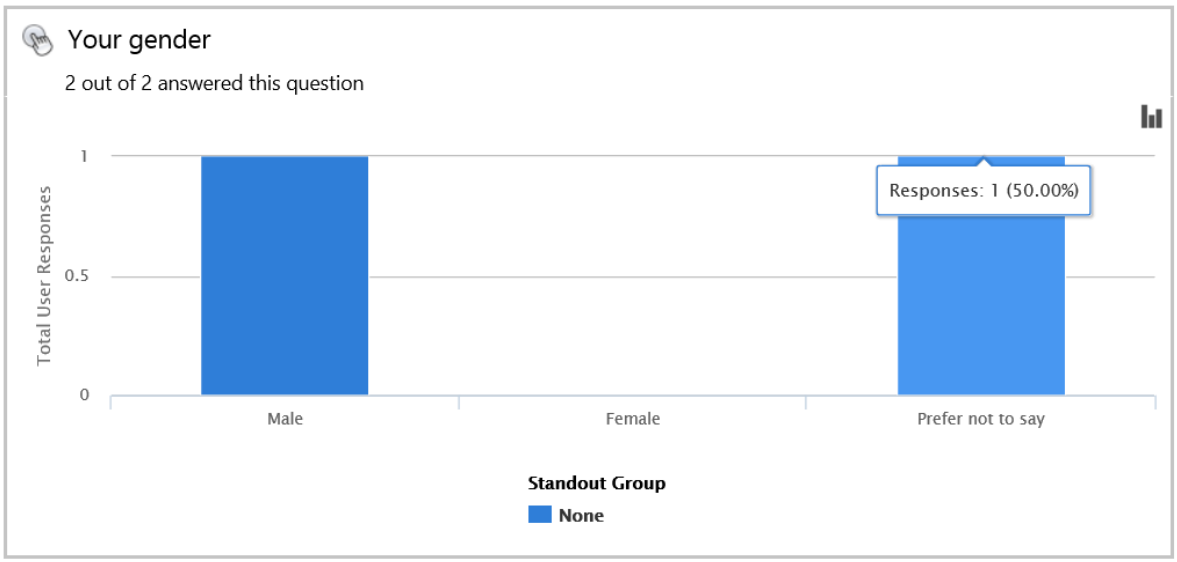
The questionnaire response graph style can be changed from a vertical display to a horizontal display. If the mouse's cursor is hovered over the answer bars a change graph style icon appears.

Clicking the mouse on the change graph style icon will reveal the selection for vertical or horizontal graphs.



Each chart can be displayed individually in horizontal or vertical style by clicking the mouse on that questions' change graph style icon.

Hovering the mouse cursor over the graph will reveal the statistics for the question responses.



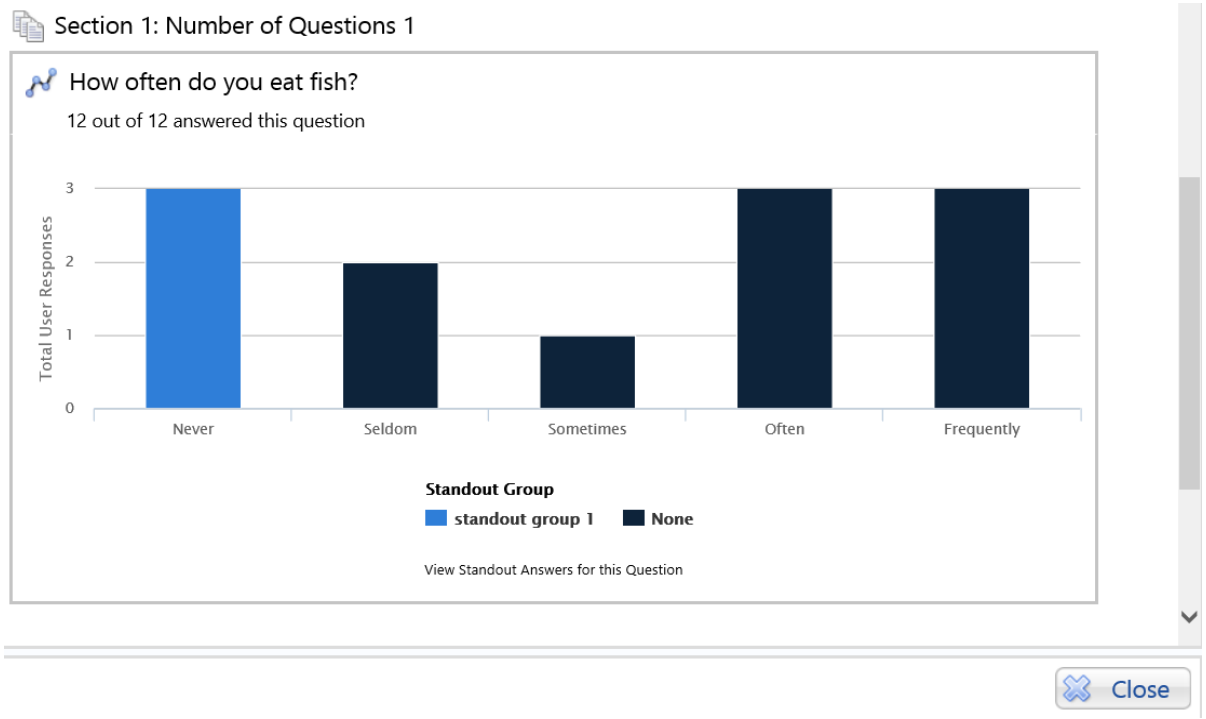
11.2.9.9.4.3. Rating Scale Responses

Typically – for a rating question rated one (1) to five (5) – the bar graph would display the number of people who answered each question (in this example 12) and the number that were asked each question (in this example 12).

Example: Rating Scale, Response Graph

If, out of a total of 12 respondents, rating questions 1, 2, 3, 4, and 5 were answered by 3, 2, 1, 3 and 3 respondents respectively, the graph would display the results as follows.

Example of an Interview Response Summary report.



Click *Close* to return to the folder containing the selected document.

11.2.9.9.4.4. Selection Responses

All Selection (multiple choice) options are displayed on the graph and show the number of respondents to answer each particular option.

Note: Because a respondent may be allowed to select *Multiple answers* to a single question, the graph may display percentages greater than 100%.

11.2.9.9.4.5. Input Responses

Input (text and date) Response Graphs display a maximum of nine (9) responses. The top eight (8) most common responses are displayed separately, with all of the remaining responses (i.e. the least common), grouped together as *Other*.

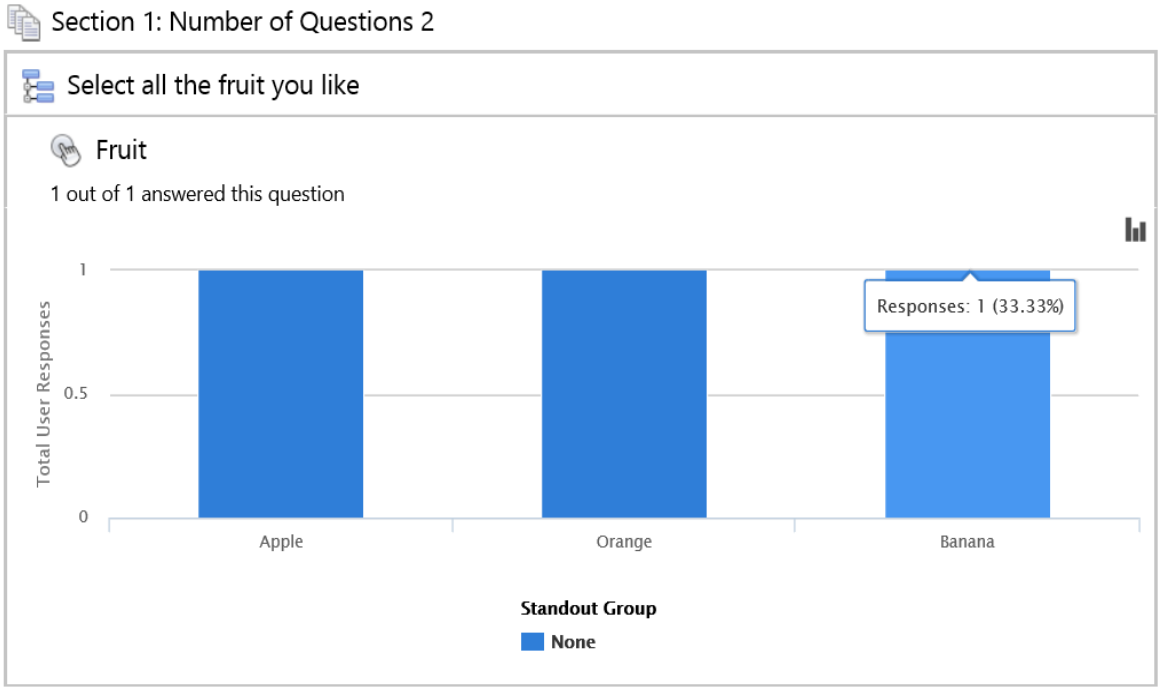
11.2.9.9.4.6. Matrix Responses

The *Questionnaire Response Summary Report* will display the *Header Question* first and then display its *sub-questions* (which form the matrix) as secondary questions with their respective answers displayed graphically.

Each *Matrix Type Question* is *grouped separately* in the *Questionnaire Response Summary report*.

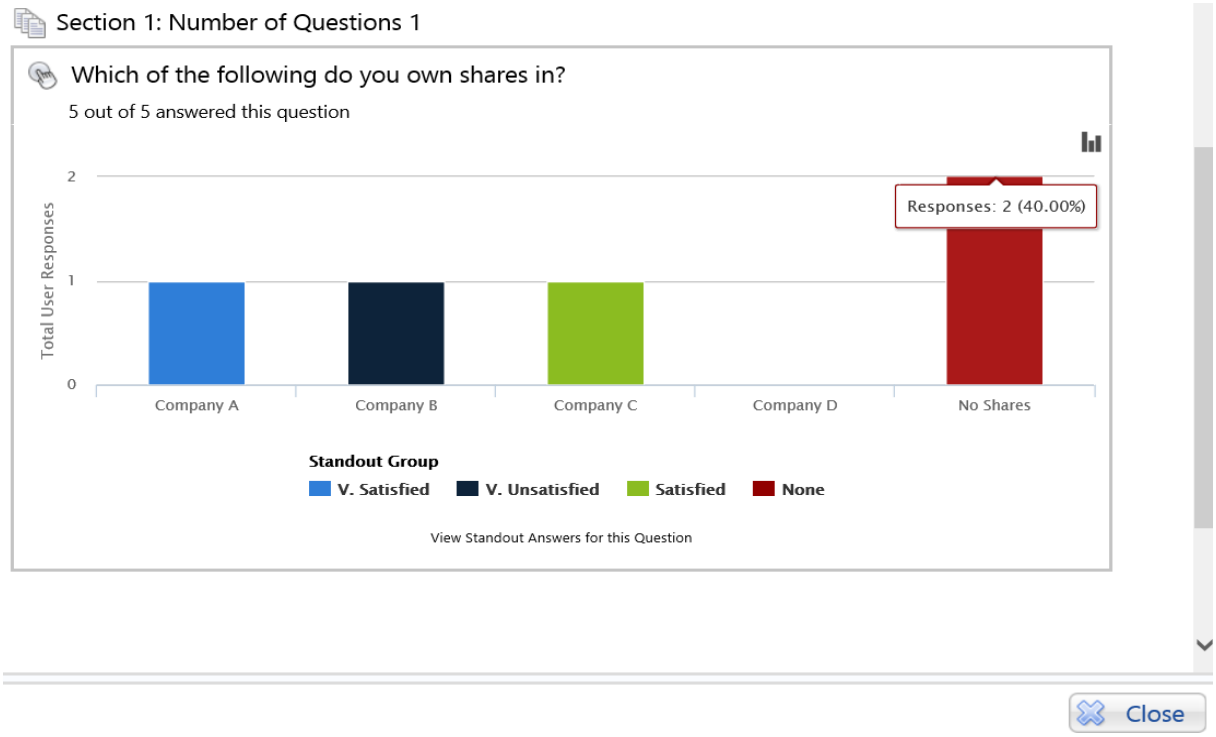
In the following example, there are three questions published as a *Matrix Question:*

- The first *header* question is based on the topic of *Fruit*
- Its three sub-questions are grouped below that header question.



11.2.9.9.4.7. Standout Answers

If there are multiple Standout Answers within a question, each Standout Answer group is displayed in a different colour.



In the above example there are five Standout Answers to the question: 'Which of the following do you own shares in?' - *Company A*, *Company B*, *Company C or Company D* and *No shares*. (If you hover the mouse's cursor over a result, the number of replies and that percentage is displayed.)

11.2.9.9.4.8. Viewing Reports Across Multiple Revisions

When you view a *Questionnaire Response Summary* report across *multiple revisions* of a *Questionnaire*, the report will *merge statistics* for questions common to those revisions and display the statistics in a single graph.

From a reporting perspective:

- A question used across multiple revisions of a *Questionnaire* is considered to be the same question until a change is made to it.
- When a previously used question is changed, this effectively makes it a new question, breaking the link to the original.
- This will result in the *Questionnaire* response summary report displaying it separately to the original question.

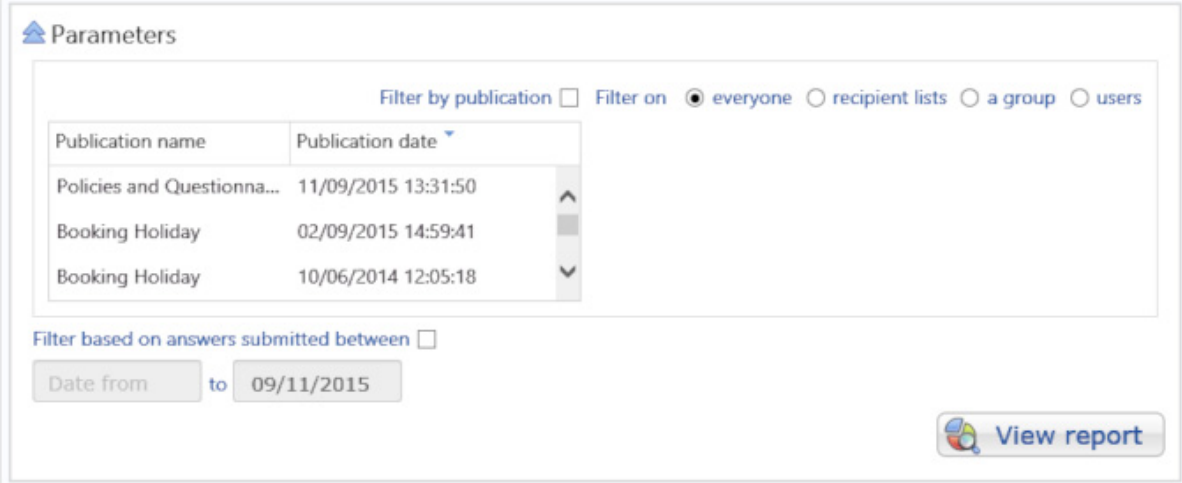
Note: A separate graph will be displayed for each new question.

11.2.9.9.5. View Standout Answers Report For All Recipients Of This Questionnaire

From the selected menu item, select one of the following sub-menu options:

- *Across all dates* – shows the report with no date filter.
- *For a specific date range* – shows the report for Questionnaires *submitted* on the days specified only.

In the Summary Report's *Parameters* section (when available), you can filter by Publication, Date (from when the Questionnaire was sent), Everyone, Recipient Lists, Group and User.



Additionally, you can select the *Filter based on answers submitted between* tick box and enter the *From* and *To* dates, as required.

This report shows a graph of the number of replies belonging to each Standout Answer Group.

The column headings in the above report, are described in Table 18.

TABLE 18. Standout Answers Report

Item	Description
Standout Answer Group	The name of the Standout Answer Group. Active Link. Click on a Standout Answer Group name to display the Standout Answers By Groups report for the selected Standout Answer Group. See "Standout Answers By Group Report" on page 370, for more information.
Submission Count	The number of times an answer belonging to the Standout Answer Group was given.
Last Submitted	The date and time an answer belonging to the Standout Answer Group was submitted.

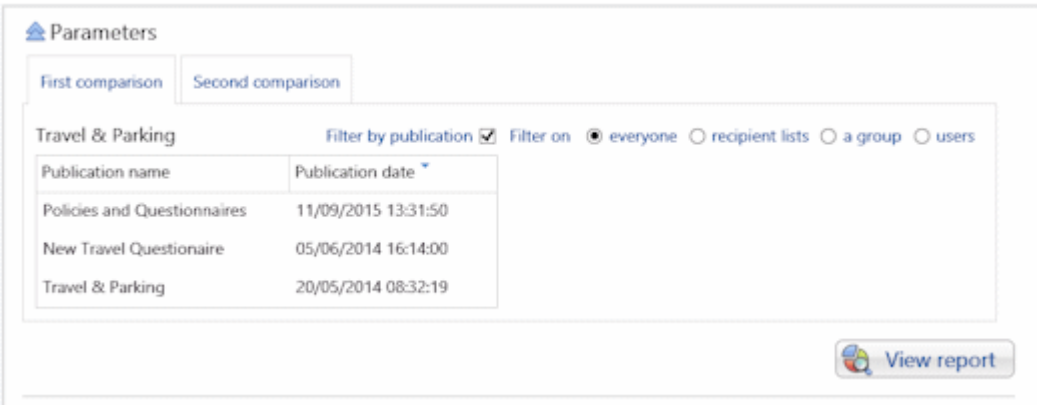
Note: If no one chose the *Standout Answers* or if the *Questionnaire* did not contain any *Standout Answers*, you will see the message 'No report data found'.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click close to return to the document library.

11.2.9.9.6. View Questionnaire Comparison Report

In the PolicyHub library, you can compare answers to a Questionnaire from different publications. Select a Questionnaire from the library. Right-click it and select *View Questionnaire Comparison Report*. The Interview Comparison report is displayed.



Note: If a Questionnaire has been returned as anonymous by *only one recipient*, you will not be permitted to view any of its responses.
Additionally, if a Questionnaire has been returned as anonymous by *more than one recipient*, you will not be permitted to view any of its responses by *Everyone, Recipient list, Group* or *User.*

On the *Comparison Report* page, select your comparison report criteria.

Note: The default report viewing criteria is *Filter by publication* with respect to *Everyone*.

The list of Publications for the chosen Questionnaire is displayed.

As required, select a Publication from under the *First comparison* tab then choose a Publication from under the *Second comparison* tab and then click *View report*.

You can also compare the answers from different Users, Groups or Recipient Lists. This can be done in addition to, or instead of, comparing responses between Publications. When you make any changes to the comparison criteria, click *View Report* to update the comparison data.

For example: You can compare the responses from Users in one group with responses from Users in another group, or you can compare the responses of all Users in a particular group with a specific User in that group to see how their responses differ.

Additionally, when you hover the mouse's cursor over any of the chart's answer bars, a percentage value is displayed which represents the percentage of the *number of participants* who chose that answer out of the *total number of answers* for that comparison set.

For example: If 10 people answered that question, 2 said A, 2 said B, 5 said C, 1 did not answer. A would display 20%, B 20%, C 50%, and Not Answered would state 10%. The total number of answers for that comparison set should always add up to 100%.

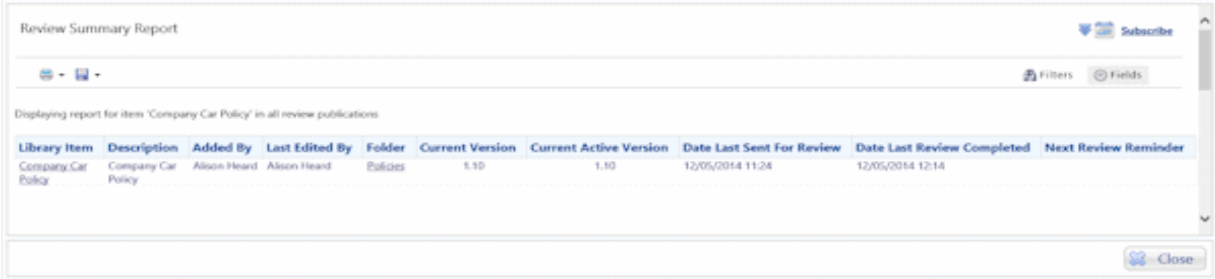
Note: You can also select the *Exclude user from the other set* tick box, if you do not want the selected User's statistics to be included in the other set.

Click *Close* to return to the folder containing the selected document.

By default, the *Questionnaire Comparison Report* displays 10 questions per page. If there are more than 10 questions in the report, a navigation tool bar is displayed at the bottom left of the page to navigate forward or backwards between pages. In the example below there are 11 questions in 2 pages of the *Questionnaire Comparison Report*.

11.2.9.9.7. View Review Summary Report For This Questionnaire

The Review Summary Report shows a summary review of the selected document.



The column headings in the above report are described in Table 19.

TABLE 19. Review Summary Report

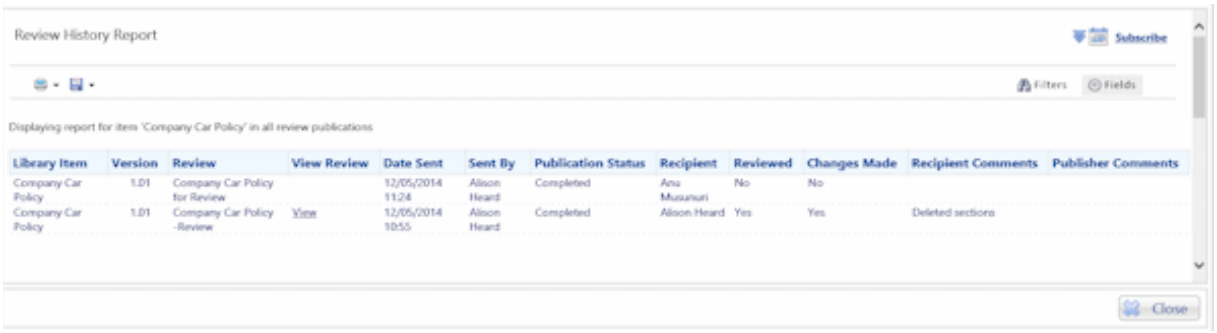
Item	Description
Library Item	The name of the selected Document, Questionnaire or Test. Active Link. Click to see a *Review History* report for the selected item. For more information, see "View Review History Report For This Document." on page 120
Description	The name of the Document, Questionnaire or Test located in the selected Folder.
Added By	The name of the person who uploaded or edited this version of the Document, Questionnaire or Test.
Last Edited By	The name of the person who last changed this version of the Document, Questionnaire or Test.
Folder	The name of the folder in which the Document, Questionnaire or Test is located. Active Link. Click to see the Document, Questionnaire or Test located in the selected Folder. See "Folder View Options" on page 93 for more information.
Current Version	The version of the Document, Questionnaire or Test located in the selected Folder.
Current Active Version	The latest active version of the Document, Questionnaire or Test located in the selected Folder.
Date Last Sent For Review	The date the Document, Questionnaire or Test (located in the selected Folder) was last sent for review.
Date Last Review Completed	The date the Document, Questionnaire or Test (located in the selected Folder) was last reviewed.
Next Review Reminder	The date the next review email for the Document, Questionnaire or Test (located in the selected Folder) will be sent.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376

Click *Close* to return to the folder containing the selected document.

11.2.9.9.8. View Review History Report For This Questionnaire

The Review History Report shows the review history of the selected document.



The column headings in the above report are described in Table 20

TABLE 20. Review History Report

Item	Description
Library Item	The name of the selected publication (Document, Questionnaire or Test).
Version	The version of the reviewed publication.
Review	The name of the reviewed publication.
View Review	Active Link. Click the underlined *View* text link to inspect the reviewed publication.
Date Sent	The date the reviewed publication was sent.
Sent By	The name of the person who sent the publication
Publication Status	Publications have the status *Completed* when: • They have been complied with by all recipients. • The rule used for Publication has expired. • They were Published directly into user library. Publications are *Active* when there are still some outstanding publications to be complied with and the rule has not expired. Publications have the status *Error* when they weren't sent because of an error. Publications have the status *Retracted* when the Publication was *Retracted*. Publications have the status *Recalled* when the Publication was *Recalled*.
Recipient	The name of the person who received the publication.
Reviewed	Indicates whether the publication was reviewed. Yes - has been reviewed. No - has not been reviewed.
Changes Made	Indicates whether changes have been made. Yes - changes have been made. No - changes have not been made.

TABLE 20. Review History Report

Item	Description
Recipient Comments	Optional (helpful) comments added by the person who received the publication.
Publisher Comments	Optional (helpful) comments added by the person who published the review publication.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click *Close* to return to the selected document.

11.2.9.10. Configure Review Schedule or Configure Notification

Note: Depending on your PolicyHub system licence, the menu selection displayed will either be "Configure Review Schedule" *or* "Configure Notification".

11.2.9.10.1. Configure Review Schedule

PolicyHub Users can have *Read* document and *Questionnaire* review reminder emails sent to them at regular intervals to remind them to review and, if necessary, update Policies and Questionnaires. See "Configure Review Schedule or Configure Notification" on page 122 for details.

11.2.9.10.2. Configure Notification

The notification configuration settings are the same as those described in "Configure Review Schedule".

11.2.9.11. Start Workflow

Note: Depending on your PolicyHub licence, Workflow may not be available in you application software.

Refer to "Start Workflow" on page 128 for a description of this menu selection.

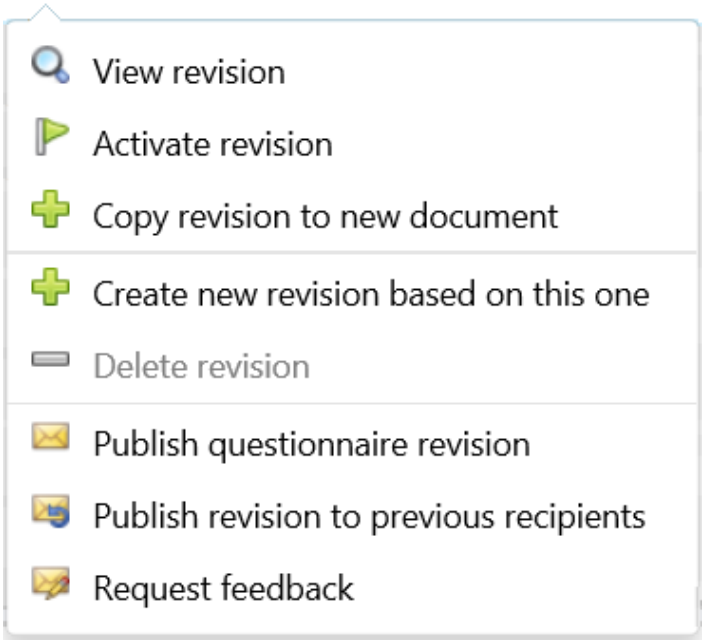
11.2.9.12. View Workflow

Note: Depending on your PolicyHub licence, Workflows may not be available in you application software.

Refer to “View Workflows” on page 129 for a description of this menu selection.

11.2.10. Questionnaire Revision Menu

The Questionnaire revision menu is displayed when you right-click on a Questionnaire revision.



11.2.10.1. View Revision

Select *View revision* to open the Questionnaire in the *Questionnaire management* page. The *Validate* and *Preview* buttons are available. You can view all the settings, but you cannot change any.

11.2.10.2. Activate Revision

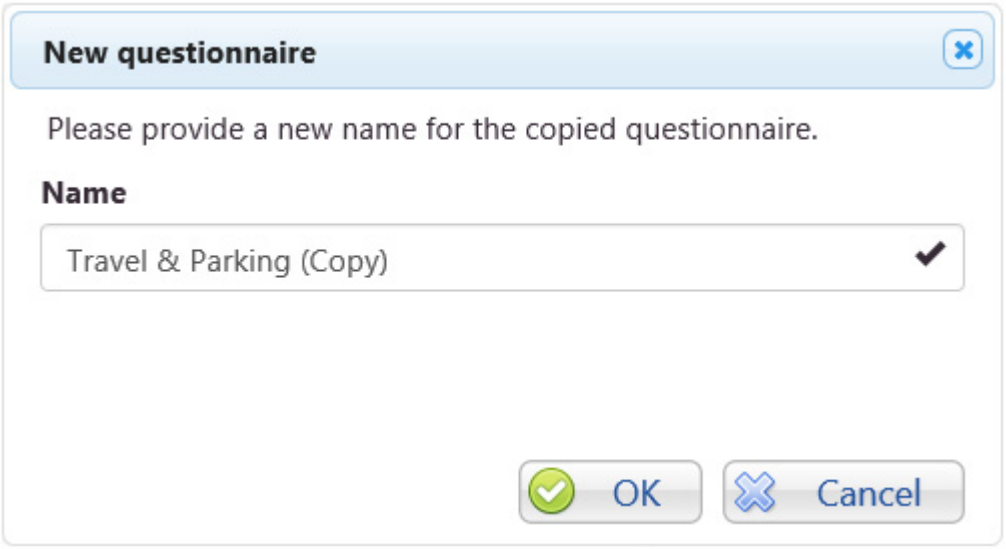
When you select a Questionnaire and select *Publish document* from the menu, the current *Active* revision of the Questionnaire is always published. To publish a revision which is *not Active*, expand the Questionnaire to show all the revisions, select the required revision and select the *Publish questionnaire revision* menu option.

To make the current revision the *Active* revision, select *Activate revision*. When the selected Questionnaire revision is already the active revision, this menu option is dimmed.

The active Questionnaire revision is displayed in green text.

11.2.10.3. Copy Revision To New Document

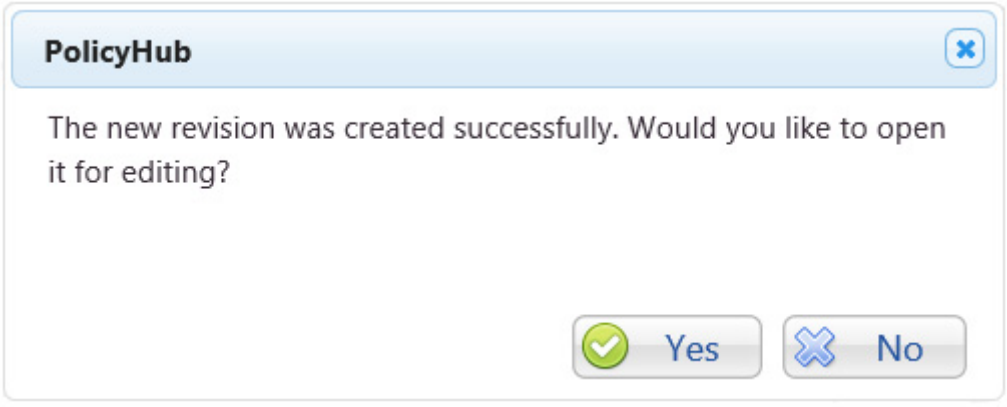
To create a new Questionnaire based on the selected Questionnaire revision, select *Copy revision to new document* from the menu. The *New questionnaire* dialog is displayed.



The default name for the new Questionnaire is the name of the original Questionnaire with *(Copy)* appended. Edit the Questionnaire name as required and then click OK. The Questionnaire is added to the same folder as the original Questionnaire.

11.2.10.4. Create New Revision Based On This One

Select this option to create a new revision of the Questionnaire based on the selected revision. A dialog is displayed asking if you want to edit the new revision for editing.



Click *Yes* to open the new Questionnaire revision for editing, or *No* to return to the library.

11.2.10.5. Delete Revision

To delete the selected revision, select *Delete revision* from the menu.

You are asked to confirm you want to delete the revision. Click *Yes* to delete the revision or *No* to cancel the deletion.

Note: Only Questionnaire revisions which have not been Published can be deleted.
If you delete the *Active* revision of a Questionnaire, you must then right-click on another revision of the Questionnaire and select *Activate revision*.

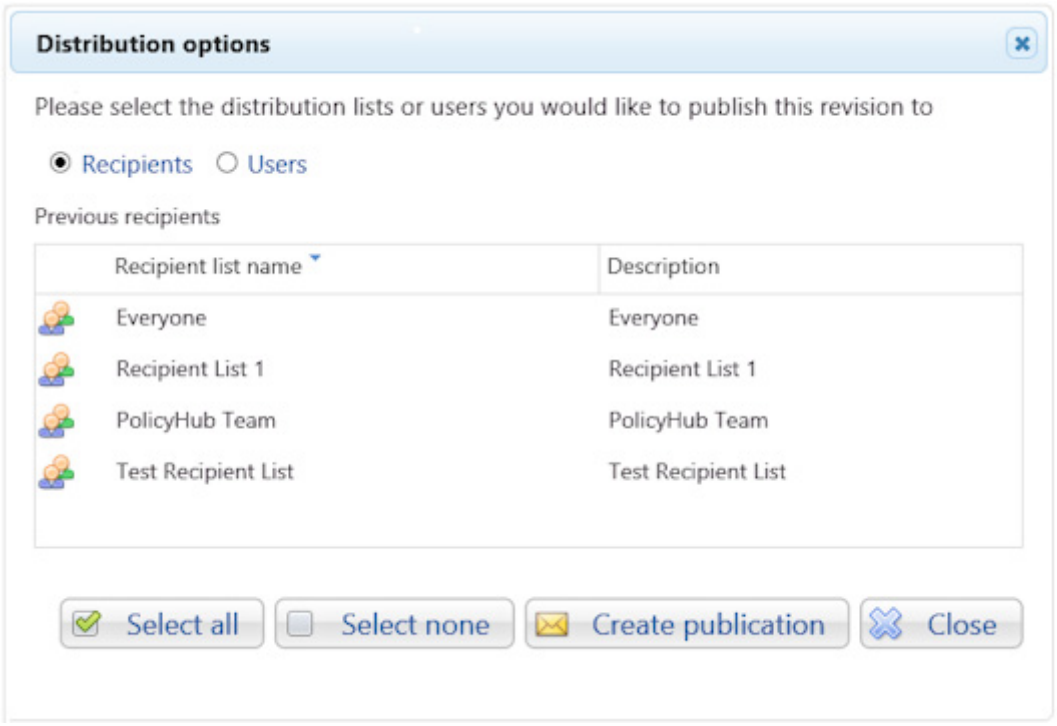
11.2.10.6. Publish Questionnaire Revision

Select this option to open the *Build New Publication* page with the selected Questionnaire revision added to the list of *Items to be published*. See "Publishing Configuration Examples" on page 53 for Publishing examples.

11.2.10.7. Publish Revision To Previous Recipients

When you want to Publish a specific revision to a Recipient List which was used previously when publishing this Questionnaire, select *Publish revision to previous recipients* from the menu.

This opens the *Distribution options* dialog.



This dialog displays the Recipients Lists which were used for previous Publications which included this Questionnaire. To display individual Users, select the *Users* radio button. Users can be sorted by *First name* or *Surname*. Recipient Lists can be sorted by *Recipient list name* or *Description*.

Note: If the Questionnaire has been sent for review, the Recipient Lists sent the review are *not* included in the list of Recipients.

11.2.10.7.1. Select All

Click to select all the listed Recipient Lists or Users.

11.2.10.7.2. Select None

Click to de-select all the selected Recipients Lists or Users.

11.2.10.7.3. Create Publication

The *Build New Publication* page is opened with the currently selected Questionnaire revision added to the *Items to be published* pane. The selected Recipient Lists or Users are added to the *Intended recipients* pane. If no Recipient Lists or Users are selected, the Publication is created with no recipients in the *Intended recipients* pane. See "Publishing Configuration Examples" on page 53 for examples and "Publishing" on page 284 for a description of all the options on the *Build New Publication* page.

11.2.10.7.4. Close

Click *Close* to return to the library without creating a Publication.

11.2.10.8. Send Questionnaire Revision For Review Or Request Feedback

Note: Depending on your PolicyHub system licence, the menu selection displayed will either be "Send Questionnaire Revision For Review" or "Request Feedback".

11.2.10.8.1. Send Questionnaire Revision For Review

Select this option to open the *Build Review Publication* page with the selected Questionnaire revision added to the list of *Items to be published*. See "Publishing Configuration Examples" on page 53 for examples.

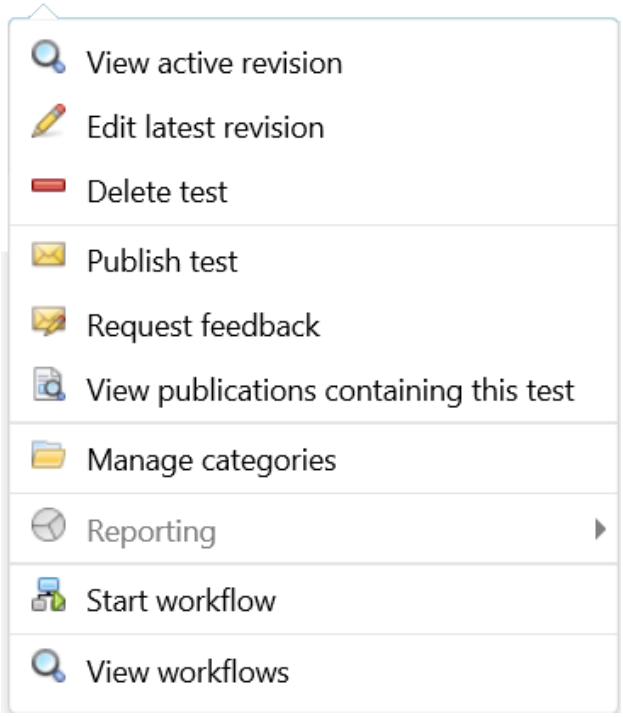
A Questionnaire is converted to a Word document before it is sent for Review.

11.2.10.8.2. Request Feedback

This option opens the *Build New Feedback Request* page with the currently selected Questionnaire added to the *Items to include* pane. See "Publishing Configuration Examples" on page 53 for examples and "Publishing" on page 284 for a description of all the options on the *Build New Feedback Request* page.

11.2.11. Test Menu

The Test menu is displayed when you right-click on a Test.

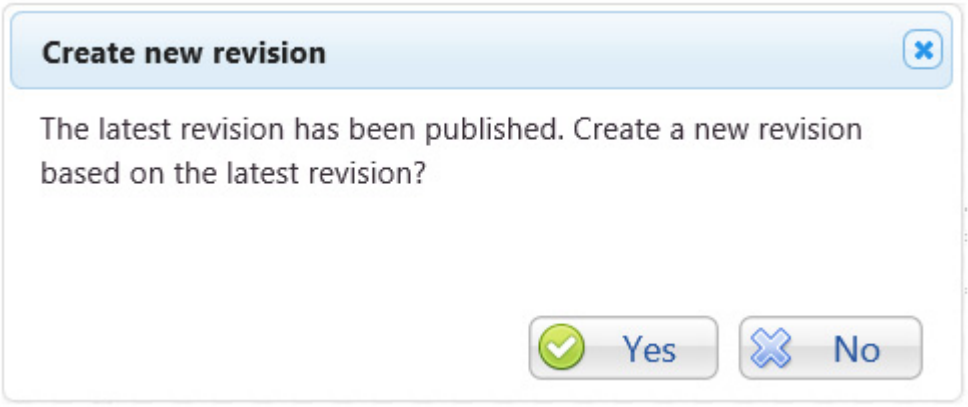


11.2.11.1. View Active Revision

Select *View active revision* from the menu. The active revision of the selected Test is opened for viewing but no changes can be made.

11.2.11.2. Edit Latest Revision

- When the latest revision has already been Published, the following dialog is displayed.



  - Click *Yes* to create a new revision of the selected Test, based on the latest revision, and open it for editing.
  - Click *No* to cancel the edit.
- When the latest revision has not yet been Published, the latest revision of the selected Test is opened for editing.

11.2.11.3. Delete Test

Select this option to delete the Test.

This option is available for *unpublished* Tests only.

11.2.11.4. Publish Test

Select this option to open the *Build New Publication* page with this Test added to the list of *Items to be published*. See "Publishing Configuration Examples" on page 53 for Publishing examples.

11.2.11.5. Send Test For Review Or Request Feedback

Note: Depending on your PolicyHub system licence, the menu selection displayed will either be "Send Test For Review" or "Request Feedback".

11.2.11.5.1. Send Test For Review

This option opens the *Build New Review Publication* page with the currently selected Test added to the *Items to be published* pane. See "Publishing Configuration Examples" on page 53 for examples and "Publishing" on page 284 for a description of all the options on the *Build New Review Publication* page.

A Test is converted to a Word document before it is sent for Review.

11.2.11.5.2. Request Feedback

This option opens the *Build New Feedback Request* page with the currently selected Test added to the *Items to include* pane. See "Publishing Configuration Examples" on page 53 for examples and "Publishing" on page 284 for a description of all the options on the *Build New Feedback Request* page.

11.2.11.6. View Publications Containing This Test

This option displays all the Publications which were used to send this Test. See "View Publications Containing This Document" on page 109 for details.

11.2.11.7. Manage Categories

Refer to "Manage Categories" on page 96 for a description of this menu selection.

Note: Depending on your PolicyHub licence, Categories may not be available in your application software.

11.2.11.8. Reporting

In the PolicyHub library, you can investigate the responses to a Test by Publication, Date Range (that is, when the Test was sent), Recipient List, Group, and Users.

Right-click on a Test in the PolicyHub library and select *Reporting*. The following menu is displayed.

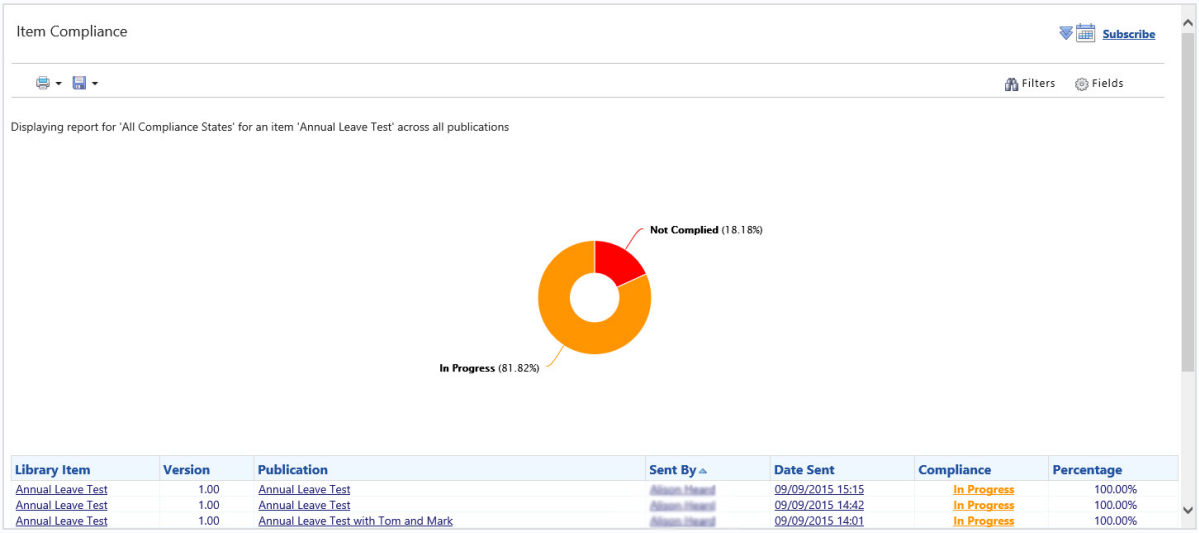
When selected, each menu item will generate a report.

To investigate in more detail, click on any of the active links (underlined text) in the report.

Note: A report toolbar is displayed on each report. See “Report Toolbar” on page 363 for a description of the toolbar.
Each report includes a *Filters* tab which displays or hides filters which can be used to refine the report. For more information about adding and or changing filtering options, see “Date Filters” on page 371, “Additional Filtering Options” on page 372 and “Changing the Default Filtering Option” on page 373.
Each report also has the capability to sort data within each column. For more information See “Sorting Report Data Within Columns” on page 376.
The reports also include a *Fields* tab which displays or hides fields which can also be used to refine the report. For more information see “Adding/Removing Columns From Reports” on page 376. Large reports contain a tool bar to navigate between report pages. For more information See “Report Pagination” on page 377.
The *Subscribe* button enables the User to create a report subscription. For more information see “Creating Subscriptions” on page 380.

11.2.11.8.1. View Compliance Report For All Recipients Of This Test

This report displays a chart for the selected Test showing the different versions published and whether they were *Complied*, *In Progress*, *Not Complied* or whether there was an *Error*.



The column headings in the above report are described in Table 21.

TABLE 21. Item Compliance Report

Item	Description
Library Item	The name of the Document, Questionnaire or Test you right-clicked in the library. Active Link. Click to display the *Item Compliance* report for the selected library item for all Publications.
Version	The version of the document which was included in the Publication.
Publication	The name of the Publication this version of the document was published with, on the date shown. Active Link. Click to display the *Item Compliance* report for the selected Document, Questionnaire or Test for the selected Publication only.
Sent By	The name of the person who published this version of the document on the date shown. Active Link. Click to see the *Publication Compliance* report for the selected user. See "Publication Compliance Report" on page 367 for more information.
Date Sent	The date the Publication was sent. Active Link. Click to see the *Publication Compliance* report for all Publications sent on the selected date. See "Publication Compliance Report" on page 367 for more information.

TABLE 21. Item Compliance Report

Item	Description
Compliance	The compliance status (Complied, In Progress, Not Complied or in Error) of this Document. Active Link. Click to display the *User Action* report for the selected users and the selected Compliance Status. See "User Action Report" on page 270 for more information.
Percentage	The percentage of recipients of the Publication with the compliance state shown.
Publication Status (Hidden by default)	Publications have the status *Completed* when: • They have been complied with by all recipients. • The rule used for Publication has expired. • They were Published directly into user library. Publications are *Active* when there are still some outstanding publications to be complied with and the rule has not expired. Publications have the status *Error* when they weren't sent because of an error. Publications have the status *Retracted* when the Publication was *Retracted*. Publications have the status *Recalled* when the Publication was *Recalled*.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

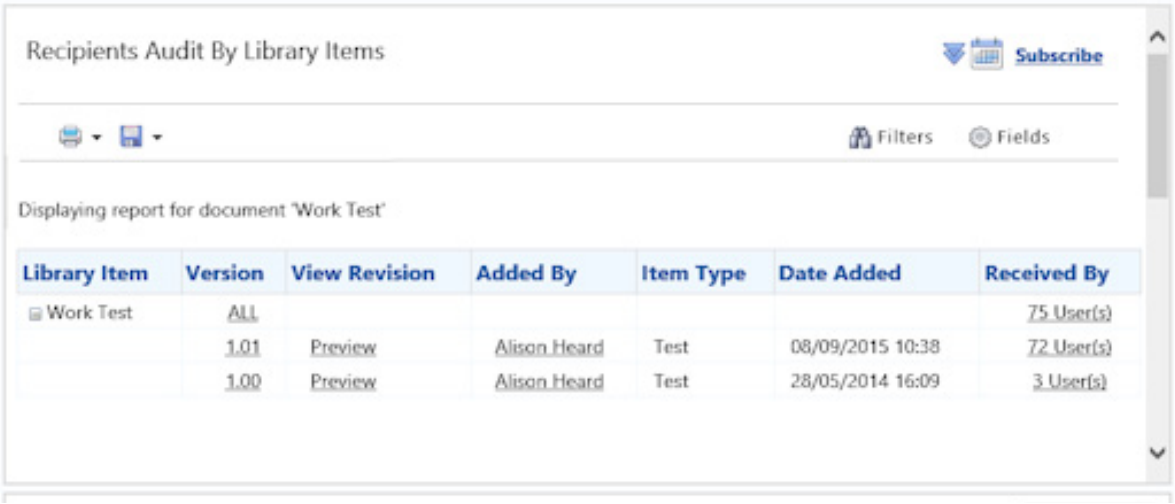
Click *Close* to return to the folder containing the selected document.

11.2.11.8.2. View Audit Report For All Recipients Of This Test

From the selected menu item, select one of the following sub-menu options:

- *Across all dates* – shows the report with no date filter.
- *For a specific date range* – shows the report for Publications containing this Test which were sent on the days specified only.

This report shows how many people received each Published version of the selected Test.



The column headings in the above report are described in Table 22.

TABLE 22. Recipients Audit By Library Items Report

Item	Description
Library Item	The name of the test you right-clicked in the library.
Version	The version of the test that was edited by the person shown. Active Link. Click on a test version to display the *Library Item Audit By Recipients* report for the selected test version. See "Library Item Audit By Group Report" on page 318 for more information.
View Revision	Active Link. Click *Preview* to preview the selected test revision.
Added By	The name of the person who uploaded or edited this version of the test. Active Link. Click to open the *User Information* report for the selected user. Report. See "User Information Report" on page 121 for information.
Item Type	Tests have the Item Type *Test.*
Date Added	The date and time this version of the test was uploaded.
Received By	The number of recipients of the version of the test. Active Link. Click on a number in the *Received By* column to display the *Library Item Audit By Recipients* report for the users who received the selected test version. See "Library Item Audit By Group Report" on page 318 for more information.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

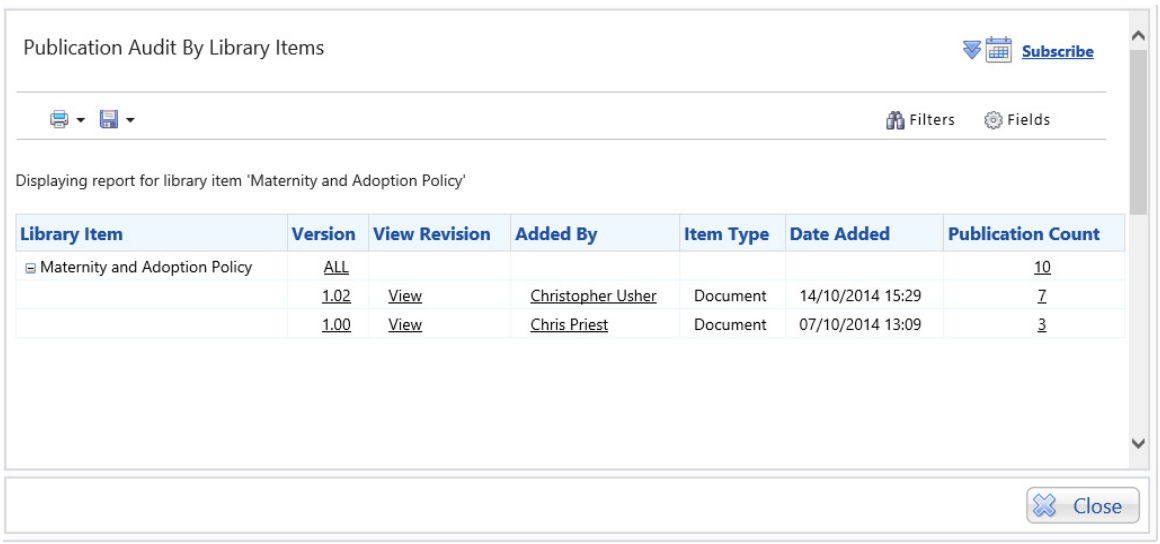
Click *Close* to return to the folder containing the selected document.

11.2.11.8.3. View Audit Report For All Publications Containing This Test

From the selected menu item, select one of the following sub-menu options:

- *Across all dates* – shows the report with no date filter.
- *For a specific date range* – shows the report for Publications containing this Test which were sent on the days specified only.

This report shows the number of times each version of the selected item was published.



The column headings in the above report are described in Table 23.

TABLE 23. Publication Audit By Library Items Report

Item	Description
Library Item	The name of the Document, Test or Questionnaire you right-clicked in the library.
Version	The version of the Document, Test or Questionnaire that was *Added by* the person shown. Active Link. Click the version to display the *Library Item Audit By Publication* report for the selected Library Item version. See "Library Item Audit By Publication Report" on page 255 for more information.
View Revision	Active Link. Click *View* to view the selected Document revision or *Preview* to preview the selected Test or Questionnaire revision.
Added By	The name of the person who uploaded or edited this version of the Document, Questionnaire or Test. Active Link. Click to open the *User Information* report for the selected user. Report. See "User Information Report" on page 121 for information.
Item Type	A Policy Document has the document type *Document*. A Questionnaire has the document type *Questionnaire*. A Test has the document type *Test*.

TABLE 23. Publication Audit By Library Items Report

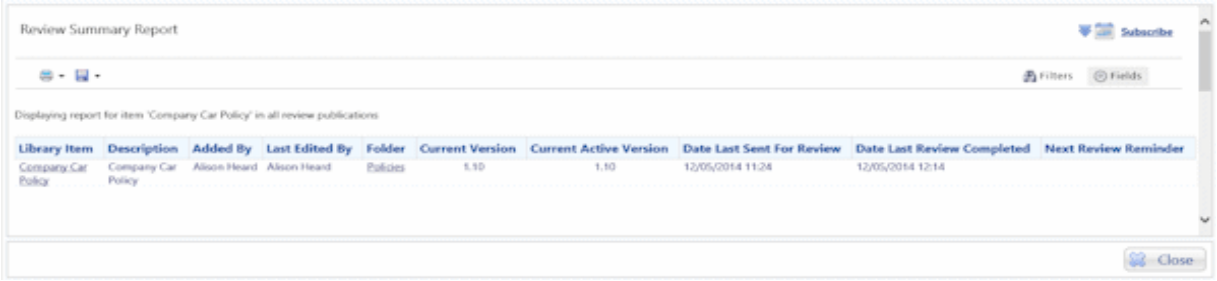
Item	Description
Date Added	The date and time this version of the Document, Questionnaire or Test was uploaded.
Publication Count	The number of times the version of the Document, Test or Questionnaire was published. Active Link. Click the Publication Count to display the *Library Item Audit By Publication* report for the Publications included in the selected Publication Count. See "Library Item Audit By Publication Report" on page 255 for more information.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click *Close* to return to the folder containing the selected document.

11.2.11.8.4. View Review Summary Report For This Test

The Review Summary Report shows a summary review of the selected document.



The column headings in the above report are described in Table 24.

TABLE 24. Review Summary Report

Item	Description
Library Item	The name of the selected Document, Questionnaire or Test. Active Link. Click to see a *Review History* report for the selected item. For more information, see "View Review History Report For This Document." on page 120
Description	The name of the Document, Questionnaire or Test located in the selected Folder.
Added By	The name of the person who uploaded or edited this version of the Document, Questionnaire or Test.

TABLE 24. Review Summary Report

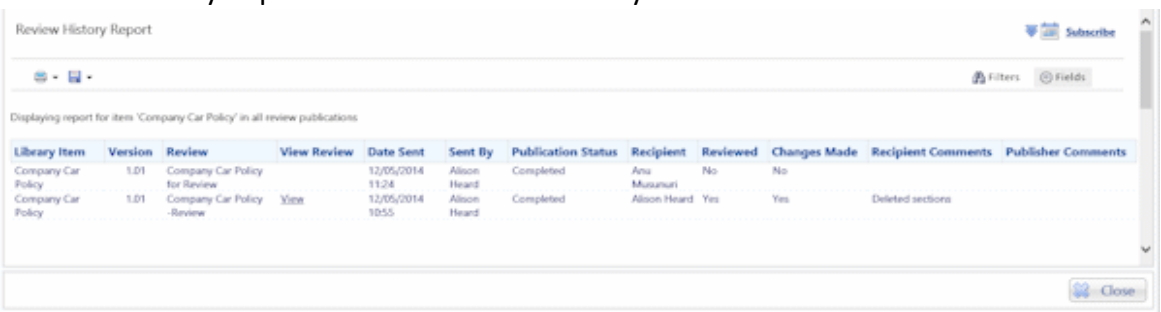
Item	Description
Last Edited By	The name of the person who last changed either the: • Uploaded Document • The Test or Questionnaire • Current revision of the Document, Questionnaire or Test
Folder	The name of the folder in which the Document, Questionnaire or Test is located. Active Link. Click to see the Document, Questionnaire or Test located in the selected Folder. See "Folder View Options" on page 93 for more information.
Current Version	The version of the Document, Questionnaire or Test located in the selected Folder.
Current Active Version	The latest active version of the Document, Questionnaire or Test located in the selected Folder.
Date Last Sent For Review	The date the Document, Questionnaire or Test (located in the selected Folder) was last sent for review.
Date Last Review Completed	The date the Document, Questionnaire or Test (located in the selected Folder) was last reviewed.
Next Review Reminder	The date the next review email for the Document, Questionnaire or Test (located in the selected Folder) will be sent.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376

Click *Close* to return to the folder containing the selected document.

11.2.11.8.5. View Review History Report For This Test

The Review History Report shows the review history of the selected document.



The column headings in the above report are described in Table 25

TABLE 25. Review History Report

Item	Description
Library Item	The name of the selected publication (Document, Questionnaire or Test).
Version	The version of the reviewed publication.
Review	The name of the reviewed publication.
View Review	Active Link. Click the underlined *View* text link to inspect the reviewed publication.
Date Sent	The date the reviewed publication was sent.
Sent By	The name of the person who sent the publication
Publication Status	Publications have the status *Completed* when: • They have been complied with by all recipients. • The rule used for Publication has expired. • They were Published directly into user library. Publications are *Active* when there are still some outstanding publications to be complied with and the rule has not expired. Publications have the status *Error* when they weren't sent because of an error. Publications have the status *Retracted* when the Publication was *Retracted*. Publications have the status *Recalled* when the Publication was *Recalled*.
Recipient	The name of the person who received the publication.
Reviewed	Indicates whether the publication was reviewed. Yes - has been reviewed. No - has not been reviewed.
Changes Made	Indicates whether changes have been made. Yes - changes have been made. No - changes have not been made.
Recipient Comments	Optional (helpful) comments added by the person who received the publication.
Publisher Comments	Optional (helpful) comments added by the person who published the review publication.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click *Close* to return to the selected document.

11.2.11.9. Start Workflow

Note: Depending on your PolicyHub licence, Workflow may not be available in you application software.

Refer to "Start Workflow" on page 128 for a description of this menu selection.

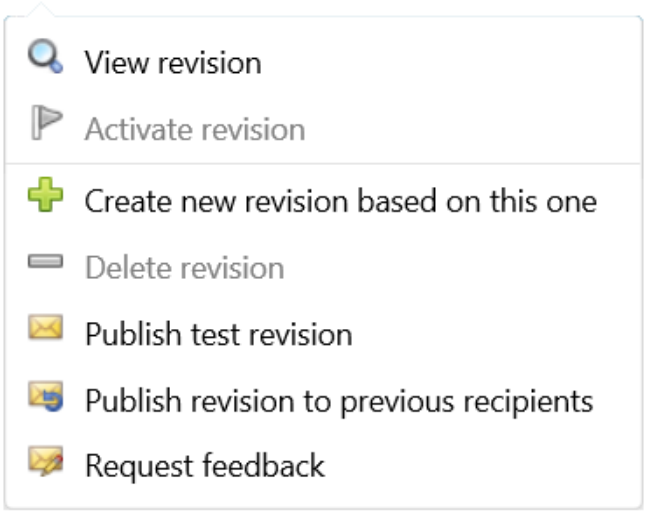
11.2.11.10. View Workflows

Note: Depending on your PolicyHub licence, Workflows may not be available in you application software.

Refer to "View Workflows" on page 129 for a description of this menu selection.

11.2.12. Test Revision Menu

The Test revision menu is displayed when you right-click on a Test revision.



11.2.12.1. View Revision

Select *View revision* to open the Test in the *Test management* page. The *Validate* and *Preview* buttons are available. You can view all the settings, but you cannot change any.

11.2.12.2. Activate Revision

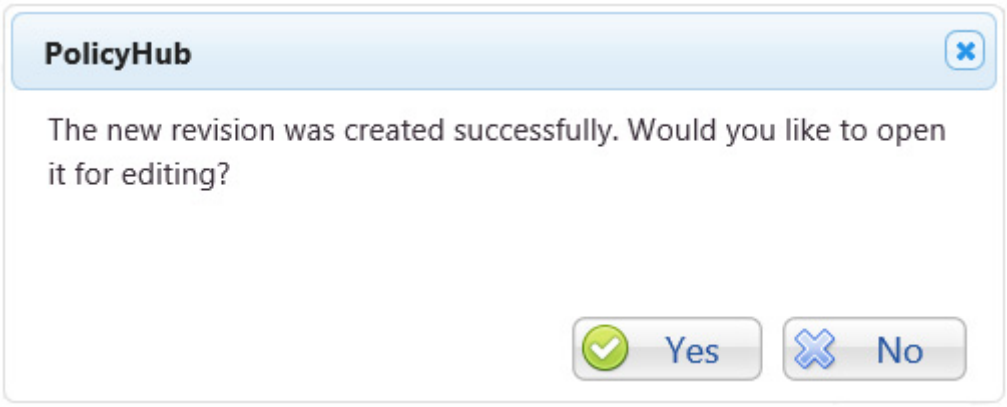
When you select a Test and select *Publish document* from the menu, the current *Active* revision of the Test is always published. To publish a revision which is *not Active*, expand the Test to show all the revisions, select the required revision and select the *Publish test revision* menu option.

To make the current revision the *Active* revision, select *Activate revision*. When the selected Test revision is already the active revision, this menu option is dimmed.

The active Test revision is displayed in green text.

11.2.12.3. Create New Revision Based On This One

Select this option to create a new revision of the Test based on the selected revision. A dialog is displayed asking if you want to edit the new revision for editing.



Click *Yes* to open the new Test revision for editing, or *No* to return to the library.

11.2.12.4. Delete Revision

To delete the selected revision, select *Delete revision* from the menu.

You are asked to confirm you want to delete the revision. Click *Yes* to delete the revision or *No* to cancel the deletion.

Note: Only Test revisions which have not been Published can be deleted.
If you delete the *Active* revision of a Test, you must then right-click on another revision of the Test and select *Activate revision*.

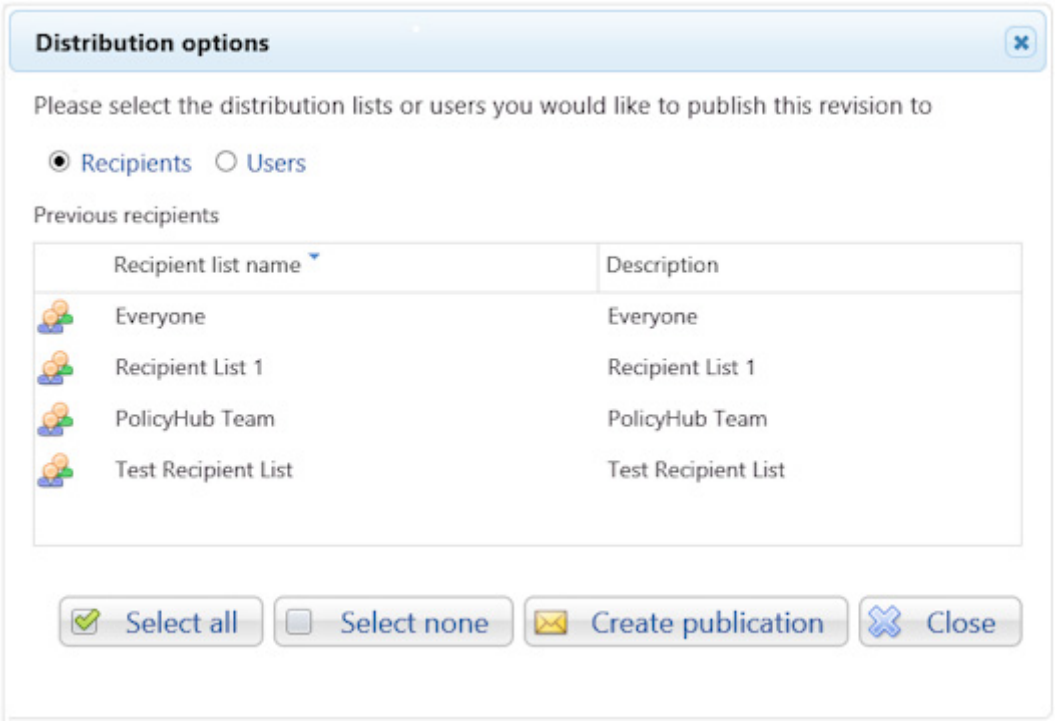
11.2.12.5. Publish Test Revision

Select this option to open the *Build New Publication* page with the selected Test revision added to the list of *Items to be published*. See "Publishing Configuration Examples" on page 53 for examples.

11.2.12.6. Publish Revision To Previous Recipients

When you want to Publish a specific revision to a Recipient List which was used previously when publishing this Test, select *Publish revision to previous recipients* from the menu.

This opens the *Distribution options* dialog.



This dialog displays the Recipients Lists which were used for previous Publications which included this Test. To display individual Users, select the *Users* radio button. Users can be sorted by *First name* or *Surname*. Recipient Lists can be sorted by *Recipient list name* or *Description*.

Note: If the Test has been sent for review, the Recipient Lists sent the review are *not* included in the list of Recipients.

11.2.12.6.1. Select All

Click to select all the listed Recipient Lists or Users.

11.2.12.6.2. Select None

Click to de-select all the selected Recipients Lists or Users.

11.2.12.6.3. Create Publication

The *Build New Publication* page is opened with the currently selected Test revision added to the *Items to be published* pane. The selected Recipient Lists or Users are added to the *Intended recipients* pane. If no Recipient Lists or Users are selected, the Publication is created with no recipients in the *Intended recipients* pane. See "Publishing Configuration Examples" on page 53 for Publishing examples and "Publishing" on page 284 for a description of all the options on the *Build New Publication* page.

11.2.12.6.4. Close

Click *Close* to return to the library without creating a Publication.

11.2.12.7. Send Test Revision For Review Or Request Feedback

Note: Depending on your PolicyHub system licence, the menu selection displayed will either be "Send Test Revision For Review" or "Request Feedback".

11.2.12.7.1. Send Test Revision For Review

Select this option to open the *Build Review Publication* page with the selected Test revision added to the list of *Items to be published*. See "Publishing Configuration Examples" on page 53 for examples.

A Test is converted to a Word document before it is sent for Review.

11.2.12.7.2. Request Feedback

This option opens the *Build New Feedback Request* page with the currently selected Test added to the *Items to include* pane. See "Publishing Configuration Examples" on page 53 for examples and "Publishing" on page 284 for a description of all the options on the *Build New Feedback Request* page.

11.3. Search For Words In Documents, Tests And Questionnaires

You can search through your PolicyHub library to find items containing specified words.

Enter the text for which you want to search. You must enter at least two alphanumeric characters (letters a-z and numbers 1-9). Some symbols such as (* and - are ignored, as are single letters and numbers. Therefore, the following searches are *not valid*:

- 1
- a
- (a)
- a.

The most accurate results are obtained by searching for whole words. For example, enter *company car* in the search text box to search the contents of all the items in the library for the words *company* or *car*.

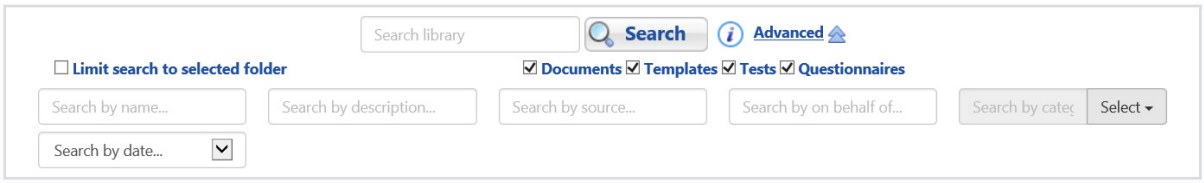
Advanced search options allow you to specify the file name, author or date the item was added to the library. See "Advanced Search Options" on page 191.

Note: You can search through your PolicyHub library for any words, *except for words on the exception list*. See "Searching Exception List" on page 422, for more information.

All the Documents, Test and Questionnaires are searched, and if any revisions contain one or more of the words specified, the Document, Questionnaire or Test is listed.

11.4. Advanced Search Options

Click on *Advanced* to display additional text boxes which enables you to search for the item's *Name*, *Description*, *Source*, *On behalf of*, and *by date* (the item was first added to the library).



Select the appropriate tick boxes to determine whether the contents of; Documents and/or Templates and/or Tests and/or Questionnaires are searched.

Select *Limit search to selected folder* to search the currently selected folder only. Leave this option clear to search all the folders in the library.

To start the search, click the *Search* button.

All the Documents, Test and/or Questionnaires (depending on the tick boxes selected) are searched, and if any revisions contain one or more of the words specified, the Document, Questionnaire or Test is displayed.

11.4.1. Search By Name, Description, Source Or 'On Behalf Of'

You can search for documents by words in the item name, description and source fields. No words or symbols are ignored in the advanced search options and words are searched for exactly as entered. For example, entering *Mitratech Software* will find *Mitratech Software Policy* but not *Mitratech Company Software Policy*. Enter text in the required search boxes to activate the corresponding search.

Search by name – enter all or part of the Document, Questionnaire or Test name.

Search by description – enter all or part of the Document, Questionnaire or Test description.

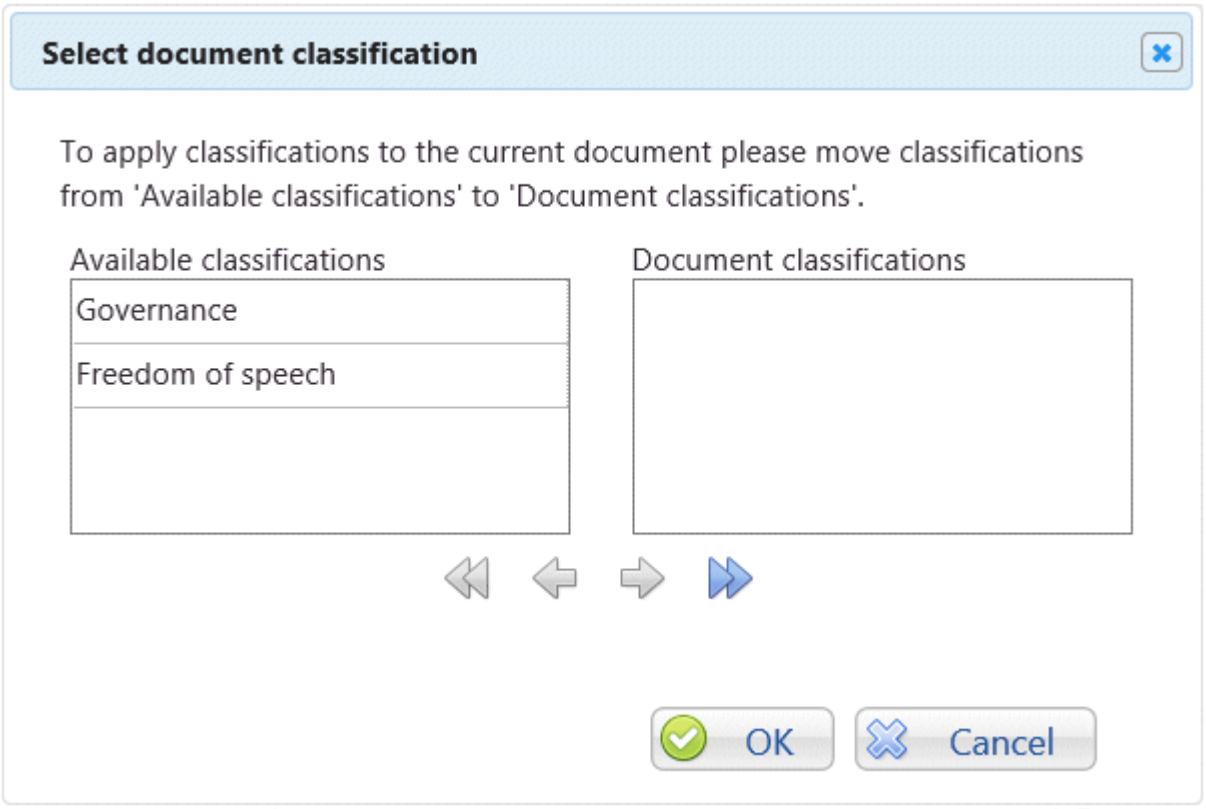
Search by source – enter all or part of the source of the Document, Questionnaire or Test.

Search by on behalf of – enter all or part of the *On behalf of* property of the Document, Questionnaire or Test.

Note: These properties are set in the Item Properties. See "Editing A Document Revision's Details" on page 134 for more information.

Search by classifications – if this option is available, click *Select* and select a *Document classification* from the *Available classifications* list, and click the single right arrow button to add it to the *Document classifications* list. Continue until you have added all the required Classifications. Click the double right arrow button to add *all* the Classifications to the *Document classifications* list. Click the single left arrow to move the selected Classification back to the *Available classifications* list, or click the double left arrow button to move *all* the

Classifications back to the *Available classifications* list. Click *OK*. This search will find any Documents with any of the selected Classifications.



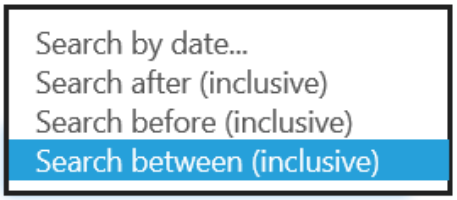
To start the search, click the *Search* button.

All the documents (in your PolicyHub library) which meet your search criteria are displayed.

11.4.2. Search Based On Date First Added

To search based on when the items were added to the PolicyHub library (that is, the date a Test or Questionnaire was first created or a Document or Template was uploaded to the library), select *Search by date* and, from the drop-down list, select one of the following options:

- Search after (inclusive)
- Search before (inclusive)
- Search between (inclusive)



11.4.2.1. Search After (Inclusive)

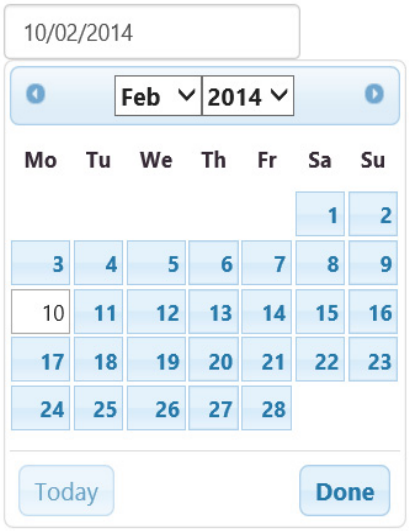
Select *Search after (inclusive)* from the drop-down list. Click in the *Start date* text box and select a date from the calendar.

Note: You can use the < and > symbols on the left and right of the displayed month and year to change the currently displayed month and year, as required.

The date appears in the text box above the calendar. This can be edited, as required. To start the search, click the *Search* button. The documents (in your PolicyHub library) which meet your search criteria are displayed.

11.4.2.2. Search Before (Inclusive)

Select *Search before (inclusive)* from the drop-down list. Click in the *End date* box and select a date from the calendar.



Note: You can use the < and > symbols on the left and right of the displayed month and year to change the currently displayed month and year, as required.

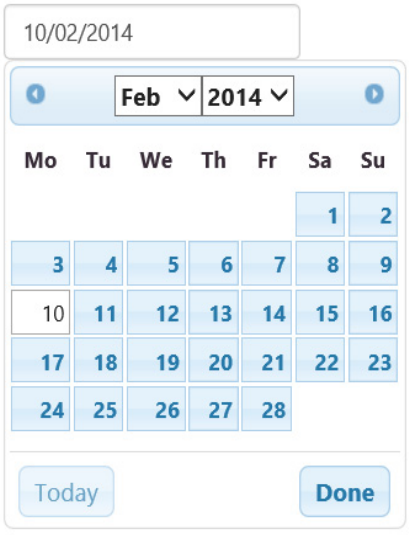
The date appears in the text box above the calendar. This can be edited, as required. To start the search, click the *Search* button. The documents (in your PolicyHub library) which meet your search criteria are displayed.

11.4.2.3. Search Between (Inclusive)

Select *Search between (inclusive)* from the drop-down list. Click in the *Start date* text box and select the required date from the calendar.

The date appears in the text box above the calendar. This can be edited, as required.

Click in the *End date* text box and select the required date from the calendar.



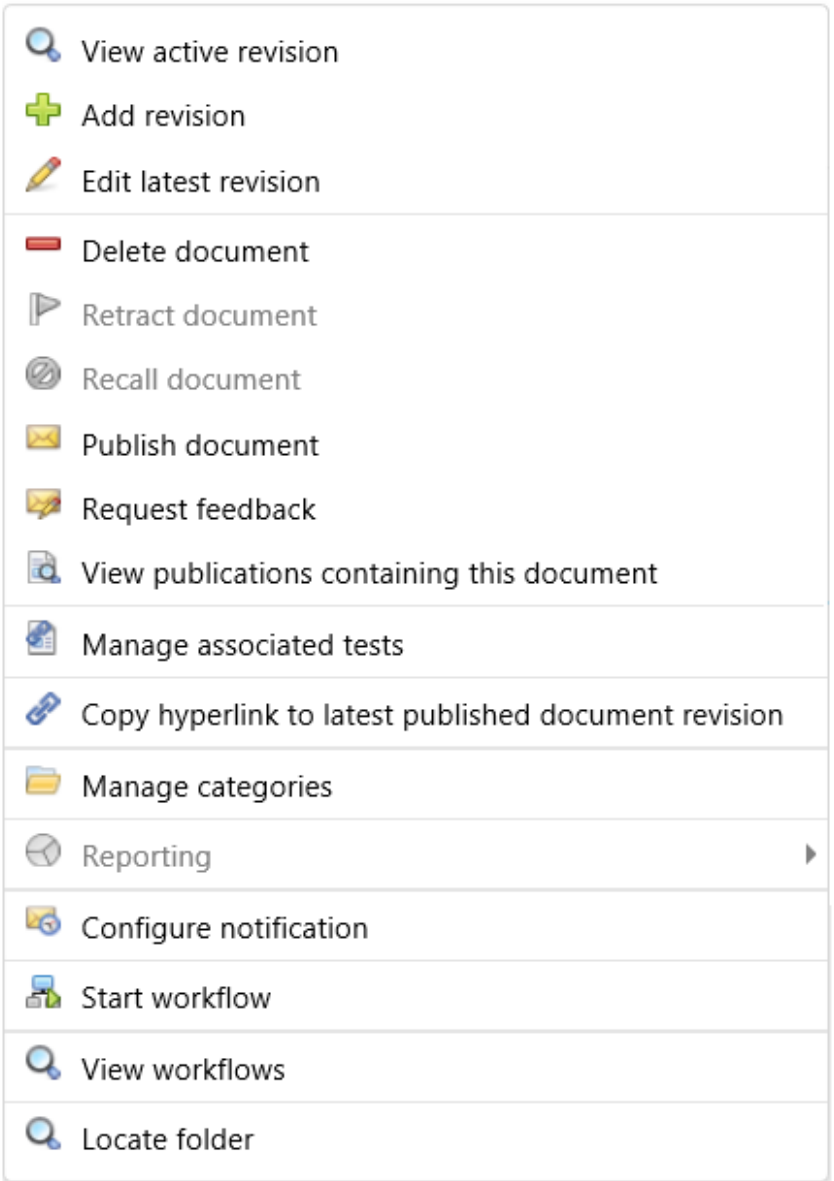
Note: You can use the < and > symbols on the left and right of the displayed month and year to change the currently displayed month and year, as required.

The date appears in the text box above the calendar. This can be edited, as required. To start the search, click the *Search* button. The documents (in your PolicyHub library) which meet your search criteria are displayed.

11.4.3. Locate A Search Result

Search results are listed below the search criteria. You can perform the same actions on the search results as you can perform from the library. Additionally, you can also locate the search result.

Right-click on the search result you want to locate to display the menu.



Select *Locate Folder* to open the library folder which contains the selected item.

11.4.4. Reporting On Search Results

The menu which is displayed when you right-click on a search result includes a Reporting option. The report menu which is displayed when Reporting is highlighted in the menu depends on the search result which has been selected. Document reports are described "Reporting" on page 113, Questionnaire reports are described in "Reporting" on page 155 and Test reports are described in "Reporting" on page 179.

11.5. Buttons

11.5.1. Delete Selected

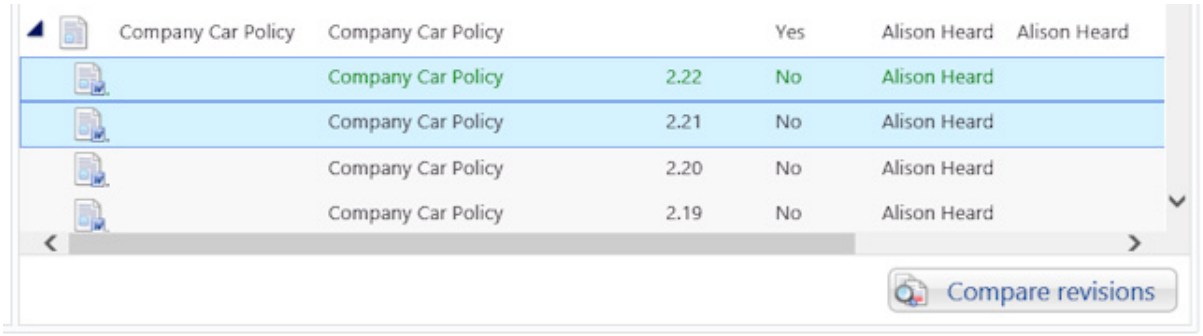
To delete multiple documents from the library, select two or more unpublished Documents, Tests or Questionnaires from the library and then click the *Delete selected* button. A dialog is displayed asking you to confirm you want to delete the items.

Note: The *Delete selected* button is greyed out when a Published Document, Test or Questionnaire is selected. This button is not available for *revisions*.

11.5.2. Compare Revisions

Two or more revisions of the same Word Document can be compared to show the differences between them. This example shows how to download the comparison document, edit it, then upload the edited document as a new revision.

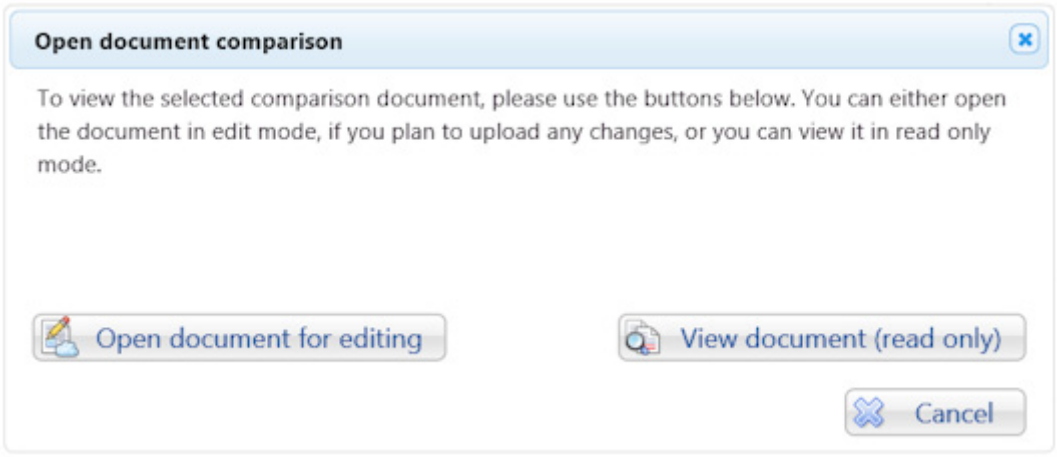
Click on the document revisions you want to compare, while holding down the *Ctrl* key. Alternatively, use the *Shift* key to select a consecutive list of documents by clicking the first revision in the list and the last revision. The *Compare revisions* button is displayed at the bottom of the pane.



Note: Selecting a single document revision will not enable the *Compare revisions* button.

11.5.2.1. Open Document Comparison

When the *Compare revisions* button is clicked, the *Open document comparison* dialog is displayed.



11.5.2.2. Buttons

11.5.2.2.1. Open Document For Editing

Click the *Open document for editing* button to open the comparison document for editing in Word. Make the required changes to the document. When you are ready to upload the new

document revision, save and close the document. You are returned to the Open document comparison dialog. To save the comparison document as a new revision, click Save as new revision. The Document description update dialog is displayed. Enter a revision description for the new revision and click Save. The edited document is added to the library as a new revision of the selected Document. Click Close to close the Open comparison dialog and return to the library.

11.5.2.2.2. View Document (Read Only)

Click the View document (read only) button to view the comparison document in Word. When you close the comparison document, you will not be given the option of uploading the document as a new revision (even if you have made changes to the document).

11.5.2.2.3. Cancel

Clicking the Cancel button cancels the document comparison. You are then returned to the document library.

11.5.3. Review Selected

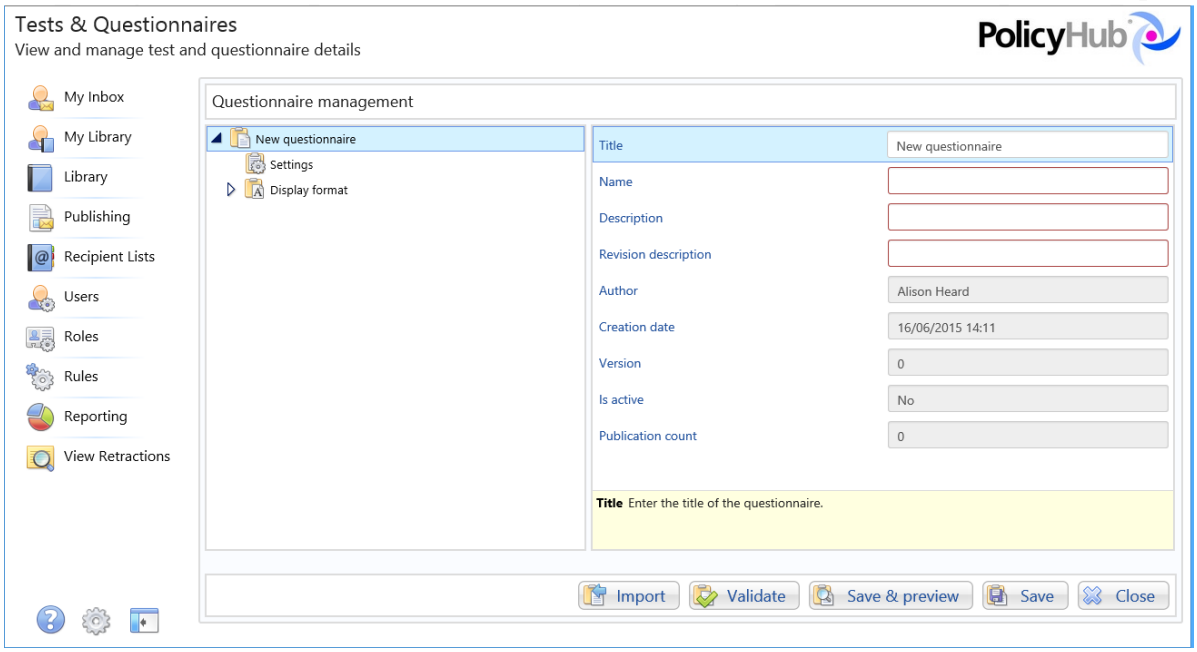
To create a Review Publication with the selected Documents, Tests or Questionnaires, select two or more Documents, Tests or Questionnaires and click the Review selected button. The Build New Review Publication page is opened and you can complete the required options for the Publication. See “Publishing” on page 284 for a description of all the Publishing options.

11.5.4. Publish Selected

To create a Compliance Publication with the selected Documents, Tests or Questionnaires, select two or more Documents, Tests or Questionnaires and click the Publish selected button. The Build New Publication page is opened and you can complete the required options for the Publication. See “Publishing” on page 284 for a description of all the Publishing options.

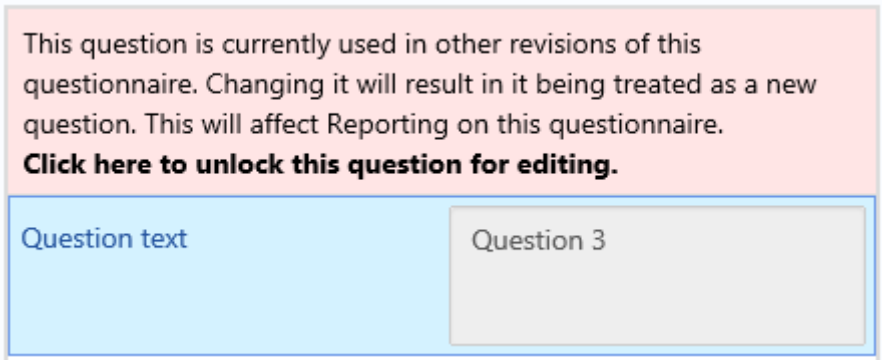
12. Questionnaires

When you create or edit a Questionnaire, the *Questionnaire management* page is opened.



12.1. Locked Questions

When editing a question in a Questionnaire which has already been Published or a Questionnaire which was created using either the *Create new revision based on this one* menu option or the *Copy revision to new document* menu option, the following warning might be displayed.



When the question is changed, it will be treated as a new question in reporting. To change the selected question, click on the text **Click here to unlock the question for editing** to unlock the question for editing.

12.2. Questionnaire Properties

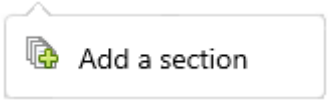
Select the Questionnaire title (or *New questionnaire* if you are creating a new Questionnaire). The options shown are described in Table 26.

TABLE 26. Questionnaire Properties

Item	Description
Title	Enter the title of the Questionnaire. This will appear on the first and last pages of the Questionnaire.
Name	The name of the Questionnaire.
Description	The description given to the Questionnaire.
Revision description	The description given to this revision of the Questionnaire.
Author	The name of the person who created this revision of the Questionnaire.
Creation date	The date the revision was created.
Version	The version number assigned to this revision of the Questionnaire.
Is active	*Yes* – this is the Active revision of the Questionnaire. *No* – this is not the active revision of this Questionnaire.
Publication count	The number of times this revision of the Questionnaire has been Published.

12.3. Questionnaire Menu

Right-click on the Questionnaire title to display the menu.



12.3.1. Add A Section

Select *Add a section* from the menu to create a new Questionnaire section. The new section is displayed below *Display format*. See "Section Properties" on page 202 for more details.

12.4. Settings

Select *Settings*. The options shown are described in Table 27.

TABLE 27. Settings

Item	Description
Questions per page	*Other* – select *Other* and then configure the number of questions you want to appear on a page. Questions from different sections will appear on different pages. *Questions per page* has a maximum value of 10. *All* – all the questions in the Questionnaire are displayed on a single page. **Note:** *Questions per page* cannot be set to more than 1 if Branching is configured on any answer. See "Branch to" on page 209.
Start-up comments	Enter comments you want to appear on the first page of the Questionnaire, under the information about taking the Questionnaire.

12.5. Display Format

The settings in the *Display format* section are described in Table 28.

TABLE 28. Display Format

Item	Description
Background colour	Sets the background (page) colour.
All sections	
Display section description as heading	When set to *Yes*, the section description is used as a heading on each page of the Questionnaire. When set to No, the section description is not used as a heading on each page and the font and colour settings here are ignored.
Background colour	When *Display section description as heading* is set to *Yes*, this option sets the background colour for the text.
Font	When *Display section description as heading* is set to *Yes*, this option sets the font for section description.
Font colour	When *Display section description as heading* is set to *Yes*, this option sets the font colour for the text.
All questions	
Background colour	Sets the background colour for the question text.
Font	Sets the font used for the questions.
Font colour	Sets the font colour for the question text.

TABLE 28. Display Format

Item	Description
All answers	
Background colour	Sets the background colour for the answer text.
Font	Sets the font used for the Selection and rating answers.
Font colour	Sets the font colour for the answer text.
Matrix question headers	
Background colour	Sets the background colour for the headers above matrix questions.
Font	Sets the font used for the headers above matrix questions.
Font colour	Sets the font colour for the headers above matrix questions.

12.6. Section Properties

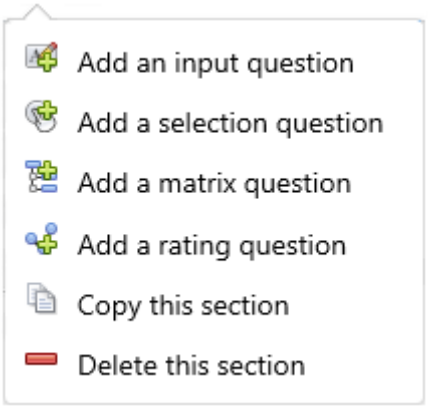
Select the section title in the left pane. The options shown are described in Table 29.

TABLE 29. Section Properties

Item	Description
Section name	Enter the name of the selected section. This is used as the title of the section in the Questionnaire.
Section description	If required, enter a description of the selected section.

12.7. Section Menu

Right-click on a section to display the menu.



12.7.1. Add An Input Question

Select *Add an input question* to add a new Input type question to the section. The new Input type question appears below the existing questions in the selected section. See “Question Properties” on page 203 for more information about Input questions.

12.7.2. Add A Selection Question

Select *Add a selection question* to add a new Selection type question to the section. The new Selection type question appears below the existing questions in the selected section. See "Question Properties" on page 203 for more information about Selection questions.

12.7.3. Add A Matrix Question

Select *Add a matrix question* to add a new Matrix question to the section. The new Matrix question appears below the existing questions in the selected section. See "Question Properties" on page 203 for more information about Matrix questions.

12.7.4. Add A Rating Question

Select *Add a rating question* to add a new Rating question to the section. The new Rating question appears below the existing questions in the selected section. See "Question Properties" on page 203 for more information about Rating questions.

12.7.5. Copy This Section

Select *Copy this section* to create an exact copy of the selected section. The new section appears below all the existing sections, contains all the questions contained in the original section and has the same name as the original section with *(Copy)* appended to the name.

12.7.6. Delete This Section

Select *Delete this section* to delete the selected section and all the questions in it.

12.8. Question Properties

Select the question in the left pane. The options shown are described in Table 30.

TABLE 30. Question Properties

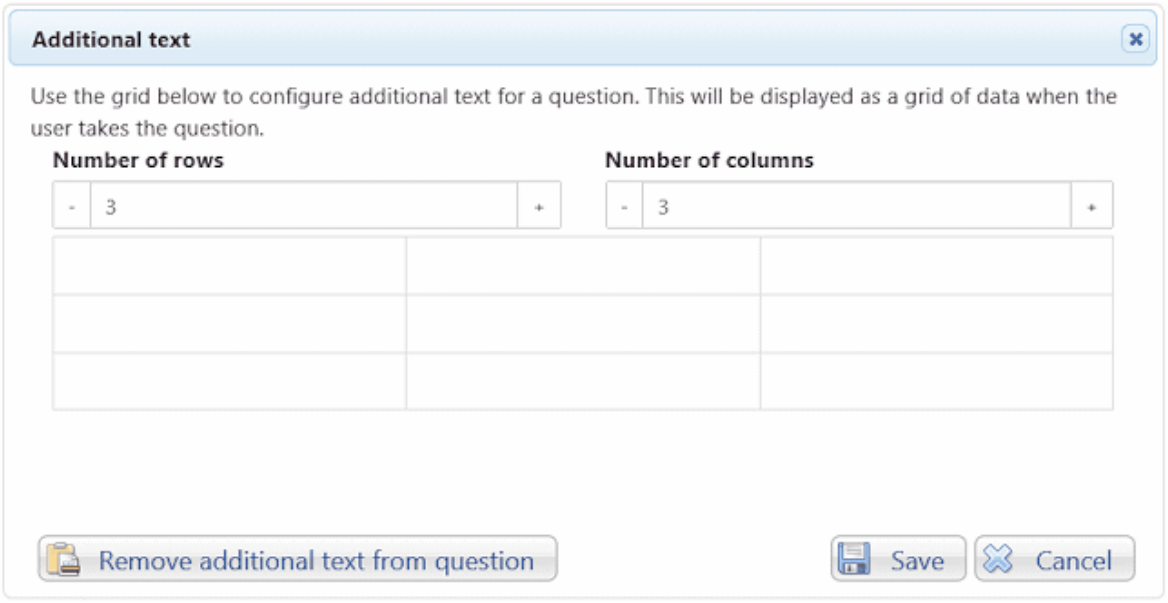
Item	Description
Question text	Enter the question, as you want it to appear.
Question tooltip	Enter more information about the question which will be active on roll over of the question text.
Question type	*Input* – the respondent must type an answer to the question. *Selection* – the respondent must select an answer from a list of answers. *Rating Scale* – the respondent must select an answer from a rating scale.
Matrix question	*Yes* – the question is a matrix question. A matrix groups and displays answers that are common to a single question. See "Create Matrix Question" on page 29 for an example matrix question. *No* – the question is not a matrix question.

TABLE 30. Question Properties

Item	Description
Input type	The Input type determines whether a date is selected from a calendar or whether text is typed in a text box. *Date* – the respondent must select a date from a calendar. *String* – the respondent must type an answer in a text box. **Note:** This option is available for *Input* type questions only.
Standout answers	*Yes* – this question has one or more answers which are flagged as Standout answers. Standout answers are used to highlight specific answers for further investigation in *Reporting*. *No* – this question does not have any Standout answers.
Include in reporting	*Include in reporting* determines whether this Input question's responses will be included in the *Response Summary Report* for this *Questionnaire.* See "View Questionnaire Response Summary Report" on page 161 for more information. *Yes* – this Input question's responses will be included in the Response Summary Report. *No* – this Input question's responses will be omitted from the Response Summary Report.
Mandatory	*Yes* – the respondent will not be allowed to submit the Questionnaire until this question has been answered. *No* – the respondent can submit the Questionnaire with this question left answered.
Allow multiple answers	*Yes* – the respondent can select more than one answer. *No* – the respondent can select one answer only. **Note:** This option is available for Selection questions only.
Additional text	Additional text can be added to a question when more information must be presented in the Questionnaire. Click on the text **Click here to add** to open the *Additional text* dialog. See "Additional Text Dialog" on page 205 for more information.

12.8.1. Additional Text Dialog

The additional text dialog enables you to add more information to a question in tabular form.



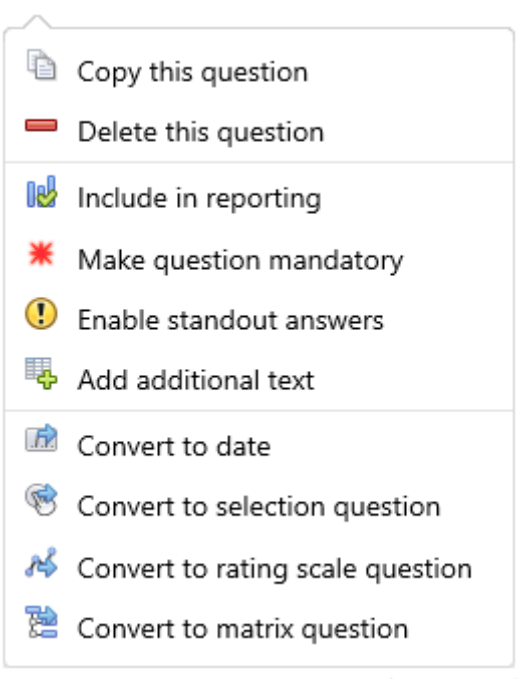
Set the number of rows and the number of columns required for the additional text. Enter the required information in the grid.

Click *Save* to save the changes or *Cancel* to exit without saving the changes.

Click *Remove additional text* from the question to delete the additional text from this question.

12.9. Question Menu

Right-click on a question to display the question menu.



12.9.1. Add Child Question

Select *Add child question* to add a new question to the selected matrix question. See "Create Matrix Question" on page 29 for an example showing how to add a child question to a matrix question.

12.9.2. Copy This Question

Select *Copy this question* to copy the selected question. The new question appears below all the existing questions in this section, contains all the options contained in the original question and has the same name as the original question with *(Copy)* appended to the name.

12.9.3. Delete This Question

To delete a question from the database, select the question you want to delete, right-click on it and select *Delete this question* from the menu.

12.9.4. Include In Reporting

Select *Include in reporting* if you want the selected Input question and responses to appear in the *Questionnaire Response Summary report*. See "View Questionnaire Response Summary Report" on page 161 for more information.

12.9.5. Do Not Include In Reporting

Select *Do not include in reporting* if you want the selected Input question and responses to be omitted from the *Questionnaire Response Summary report*.

12.9.6. Make Question Support Multiple Answers

The respondent can currently select just one answer for this Selection question. Select *Make question support multiple answers* if you want the respondent to be able to select more than one answer.

12.9.7. Make Question Support A Single Answer

The respondent can currently select more than one answer for this Selection question. Select *Make question support a single answer* if you want the respondent to be able to select just one answer.

12.9.8. Make Question Mandatory

Select *Make question mandatory* to ensure that all respondents must answer this question before submitting the Questionnaire.

12.9.9. Make Question Not Mandatory

Select *Make question not mandatory* if you want respondents to be allowed to submit the Questionnaire without answering this question.

12.9.10. Enable Standout Answers

Select *Enable standout answers* if you want to create one or more Standout answer to this question. Standout answers are used to highlight specific answers for further investigation in *Reporting*.

12.9.11. Disable Standout Answers

Select *Disable standout answers* if you want do not want to create Standout answers to this question. Standout answers are used to highlight specific answers for further investigation in *Reporting*.

12.9.12. Change Rating Scale Template

Change the template for the selected *Rating scale* question. The available rating scales are:

- Extremely Unlikely, Unlikely, Not Sure, Likely, Extremely Likely
- Never, Seldom, Sometimes, Often, Frequently
- Not Important, Slightly Important, Average, Important, Very Important
- Poor, Fair, Average, Good, Excellent
- Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree

12.9.13. Add Additional Text

Additional text can be added to a question when more information must be presented in the Questionnaire.

Select *Add additional text* to open the *Additional text* dialog. See "Additional Text Dialog" on page 205 for more information.

12.9.14. Remove Additional Text

Select *Remove additional text* to remove the Additional text which has been added to the selected question.

12.9.15. Convert To Date

The selected Input type question currently has the *Input type* set to *Text*. Select *Convert to date* if you want to change the *Input type* to *Date*.

12.9.16. Convert To Text

The selected Input type question currently has the *Input type* set to *Date*. Select *Convert to text* if you want to change the *Input type* to *Text*.

12.9.17. Convert To Input Question

Select *Convert to input question* to change the current question from a Selection or rating scale question to an Input question.

12.9.18. Convert To Selection Question

Select *Convert to selection question* to change the current question from an Input or rating scale question to a Selection question.

12.9.19. Convert To Rating Scale Question

Select *Convert to rating scale question* to change the current question from an Input or Selection question to a rating scale question.

12.9.20. Convert To Standalone Question

The selected question currently has *Matrix question* set to *Yes*. Select *Convert to standalone question* to set *Matrix question* set to *No*.

12.9.21. Convert To Matrix Question

The selected question currently has *Matrix question* set to *No*. Select *Convert to matrix question* to set *Matrix question* set to *Yes*.

12.10. Answer Properties

Select the answer in the pane on the left. The *input* options are described in Table 31.

TABLE 31. Answer Properties – Input

Item	Description
Answer	Enter the answer.
Standout answer group	Select a standout answer group from the drop-down list.
Standout match type	This option determines how exactly the respondent's answer much match the Standout answer provided for the answer to be recorded as a match to the Standout answer. *Exact* – the respondent's answer must match the Answer exactly (with no extra text). *Exact case sensitive* – the respondent's answer must match the Answer exactly (with no extra text) and with case sensitivity. *Any* – the respondent's answer needs to include the text in the Standout answer, but any extra text entered by the respondent is ignored. The case is ignored.

Select the answer in the pane on the left. The Selection options are described in Table 32.

TABLE 32. Answer Properties – Selection

Item	Description
Text	Enter the answer option, as you want it to appear.
Tooltip	Enter more information about the answer which will be active on roll over of the answer's radio button.

TABLE 32. Answer Properties – Selection

Item	Description
Selected by default	This option determines which (if any) of the supplied Selection options are selected by default. *Yes* – this answer is selected by default in the Questionnaire. *No* – this answer is not selected by default in the Questionnaire. **Note:** No more than one answer per question can be selected by default when *Allow multiple answers* is set to *No* for that question.
Standout answer group	Select a standout answer group from the drop-down list.
Branch to	If required, select the question you want to branch to when this answer is selected. Select a question from the list to branch to that question, or select *End of questionnaire* if you want to omit the remaining questions when this answer is selected. **Note:** You cannot branch unless *Questions per page* is set to 1. See Questions per page. See "Creating A Branching Question" on page 31 for an example.

Select the answer in the pane on the left. The *rating* options are described in Table 33.

TABLE 33. Answer Properties – Rating

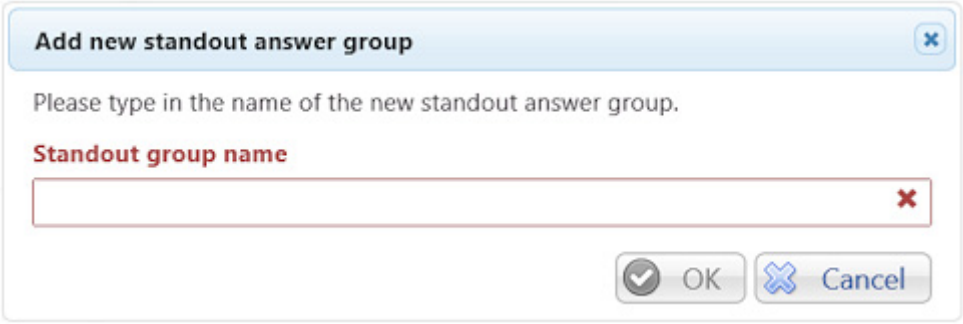
Item	Description
Text	Enter the answer option, as you want it to appear.
Tooltip	Enter more information about the answer which will be active on roll over of the answer's radio button.
Selected by default	This option determines which (if any) of the supplied rating options are selected by default. *Yes* – this answer is selected by default in the Questionnaire. *No* – this answer is not selected by default in the Questionnaire. **Note:** No more than one answer per question can be selected by default when *Allow multiple answers* is set to *No* for that question.

TABLE 33. Answer Properties – Rating

Item	Description
Standout answer group	Select a standout answer group from the drop-down list.
Branch to	If required, select the question you want to branch to when this answer is selected. Select a question to branch to that question within the same section, select the section you want to branch to or select *End of questionnaire* if you want to omit the remaining questions when this answer is selected. Select *None* if you no longer want this to be a branching question. See "Creating A Branching Question" on page 31 for an example.

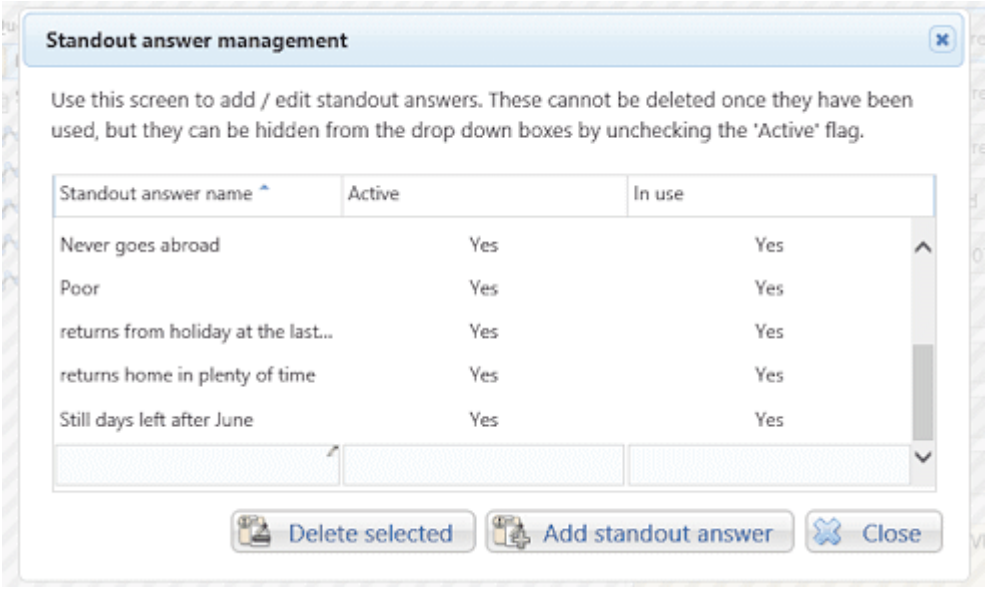
12.10.1. New Standout Answer

Select *New standout* to open the *Add new standout answer* dialog.



12.10.2. Edit Standouts

Select *Edit standouts* to open the *Standout answer management* dialog.



The *Standout answer management* dialog displays the list of Standout answer groups and their status.

The *Standout answer management* dialog options are described in Table 34.

TABLE 34. Standout Answer Management

Item	Description
Standout answer name	The name given to the Standout answer group.
Active	This option determines whether the selected Standout answer group is active or inactive. *Yes* – the Standout answer group is active and appears in the standout answer drop-down list. *No* – the Standout answer group is inactive and does *not* appear in the standout answer drop-down list.
In use	*Yes* – the Standout answer group has been used. *No* – the Standout answer group has not been used.

12.10.2.1. Buttons

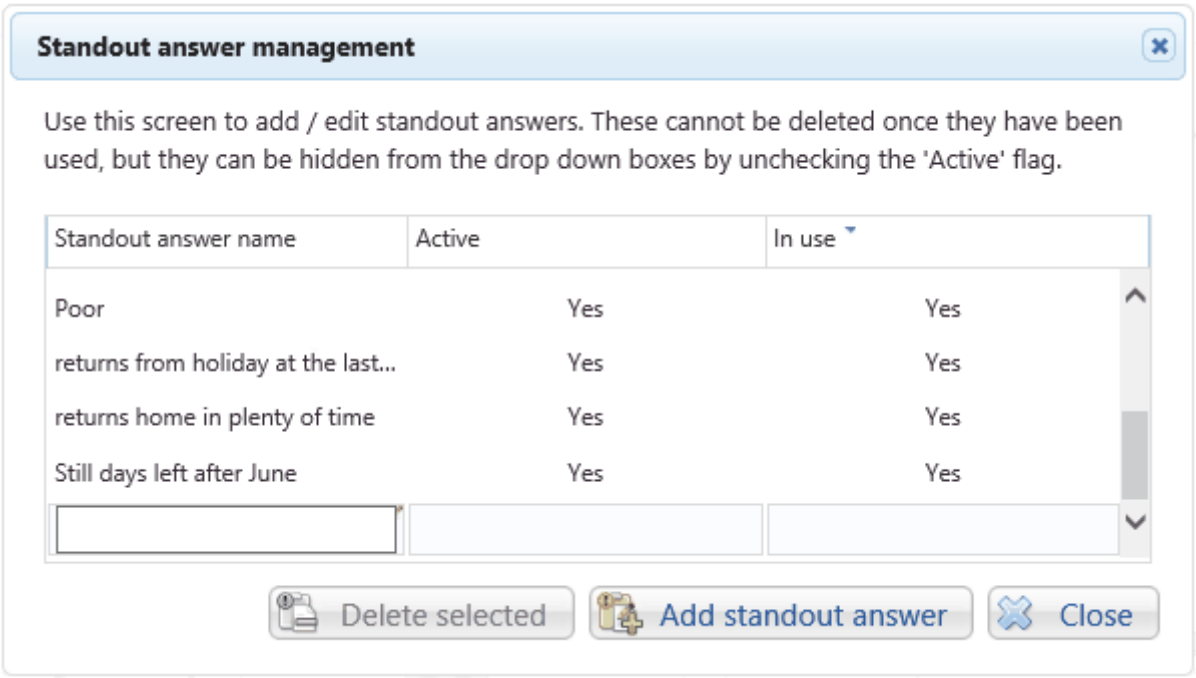
12.10.2.1.1. Delete Selected

Click *Delete selected* to delete the selected Standout answer group.

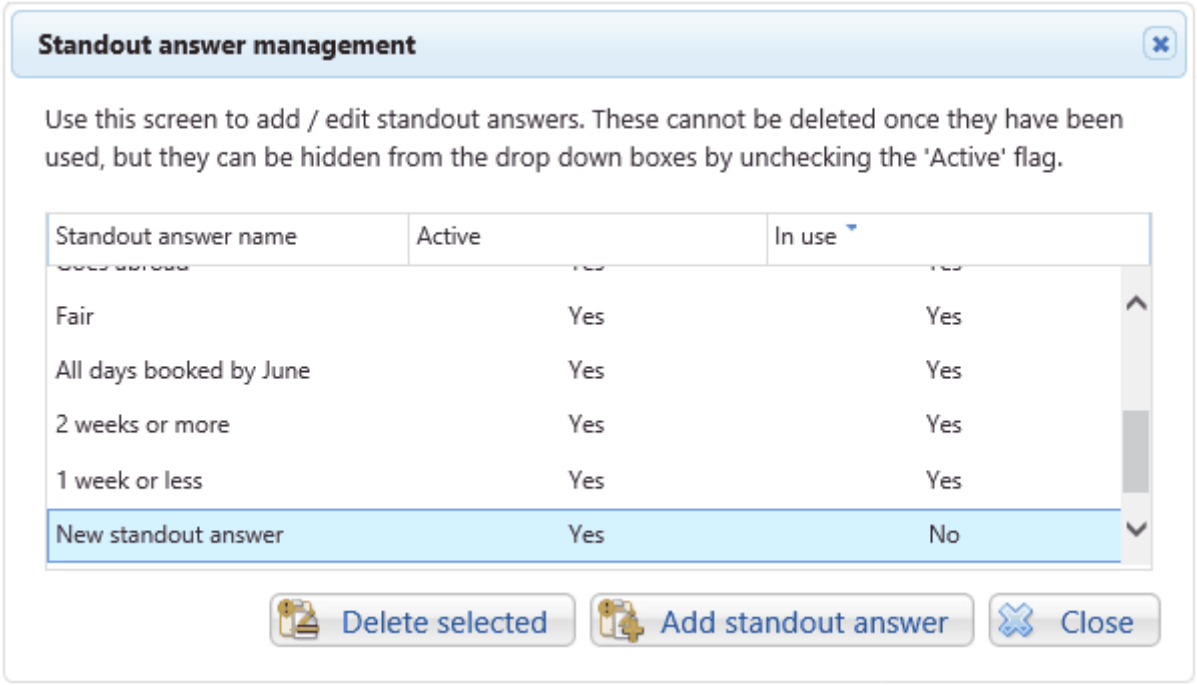
Note: This button is available for Standout answer groups which are not *In use*.

12.10.2.1.2. Add Standout Answer

Click *Add standout answer* to create a new Standout answer group. A text box is added to the bottom of the list, enabling you to name the new Standout answer group.



Enter the name of the Standout answer group in the text box. Press *Enter* to save the Standout answer group.



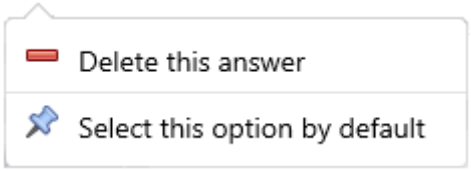
New Standout answer groups are active and, as they have not yet been used, *In use* is set to *No*.

12.10.2.1.3. Close

Click *Close* to close the *Standout answer management* dialog.

12.11. Answer Menu

Right-click on an answer to display the answer menu.



12.11.1. Delete This Answer

Delete the selected answer.

12.11.2. Select This Option By Default

This option will be selected by default in the Questionnaire.

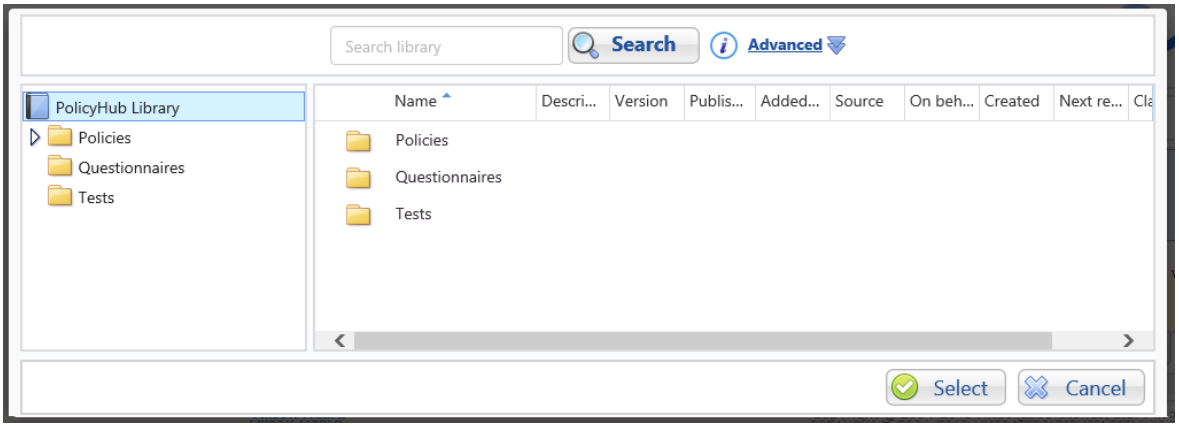
12.11.3. Clear This Option By Default

This option will not be selected by default in the Questionnaire.

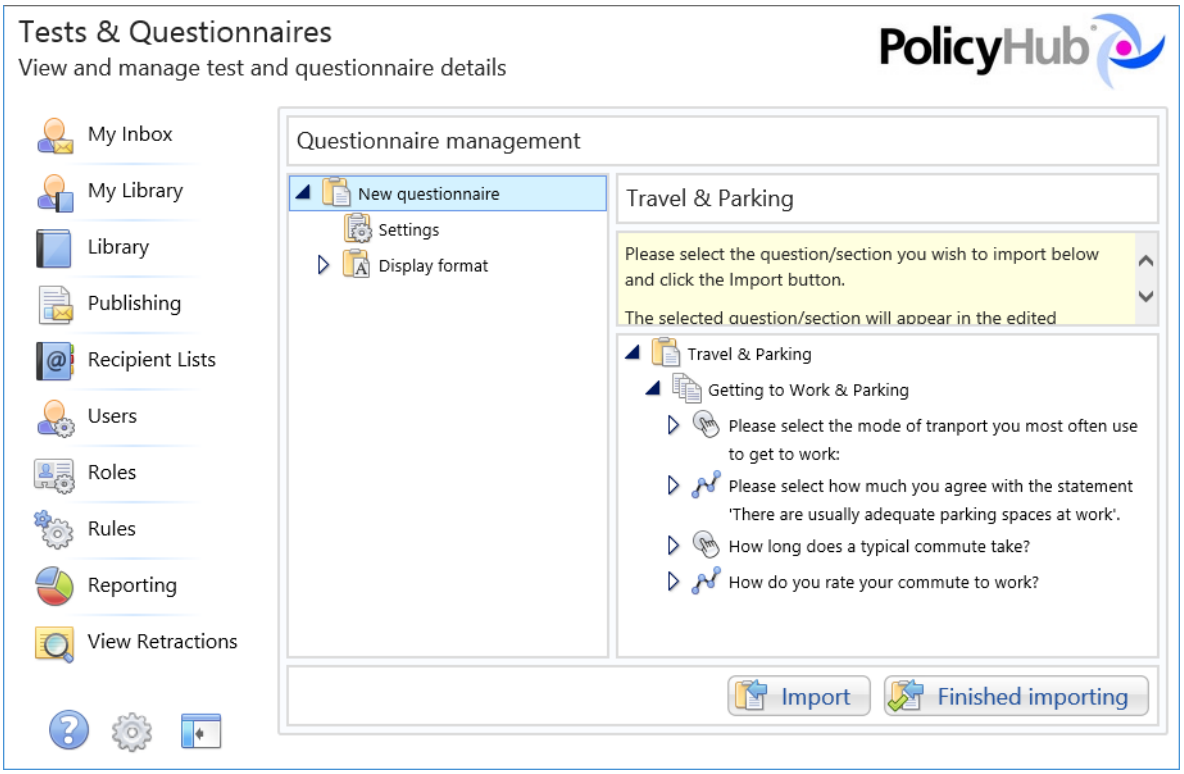
12.12. Buttons

12.12.1. Import

Click *Import* to import a whole section or an individual question from an existing Questionnaire into the Questionnaire being edited. The library is opened allowing you to browse to the folder containing the Questionnaire you want to import.

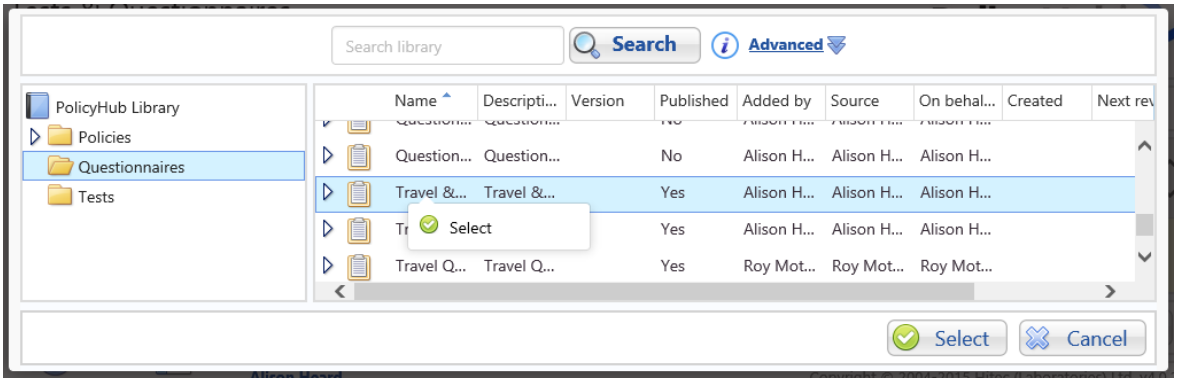


When you have browsed to the correct folder, select the Questionnaire you want to import and click *Select*. (Alternatively, see "Questionnaire Menu", below, for a right-click menu option.) The *latest* revision of the selected Questionnaire is opened. The selected Questionnaire is displayed in the panel on the right.



12.12.1.1. Questionnaire Menu

After clicking the *Import* button and browsing to the folder containing the Questionnaire you want to import, right-click on a Questionnaire to see the menu.



Click *Select* in the right-click menu to open the selected Questionnaire. The latest revision of the selected Questionnaire is opened.

12.12.1.2. Import A Section

To import a whole section of the Questionnaire in the panel on the right into the Questionnaire being edited, you must select a section or the Questionnaire title in the panel on the left and you must select the section you want to import from the panel on the right. Click *Import*. The latest revision of the Questionnaire is opened in the panel on the right. (To import multiple sections, use the *Ctrl* key while selecting the sections and then click *Import*.)

The selected section on the right is imported into the Questionnaire and appears as the last section in the edited Questionnaire.

Continue until you have imported all the required Questionnaire sections and questions and then click *Finished Importing*. You are returned to the Questionnaire editing window.

12.12.1.3. Import A Question

To import a single question from the Questionnaire in the panel on the right to the Questionnaire being edited, you must select a section in the pane on the left and you must select the question you want to import from the panel on the right. Click *Import*. (To import multiple questions, use the *Ctrl* key while selecting the questions and then click *Import*.)

Note: You must select the section you want a question to be imported into. If this is a new Questionnaire, first create a section, then select the section and click *Import*.

The selected question on the right is imported into the Questionnaire and appears as the last question in the selected section of the edited Questionnaire.

Continue until you have imported all the required Questionnaire sections and questions and then click *Finished Importing*. You are returned to the Questionnaire editing window.

12.12.2. Copy

The *Copy* button is used to copy multiple sections or multiple questions. To select consecutive items, hold down the *Shift* key and select the first and the last item. To select non-consecutive items, hold down the *Ctrl* key and select each item.

When multiple questions are selected from different sections, each question is copied to its own section only and added to the end of the section.

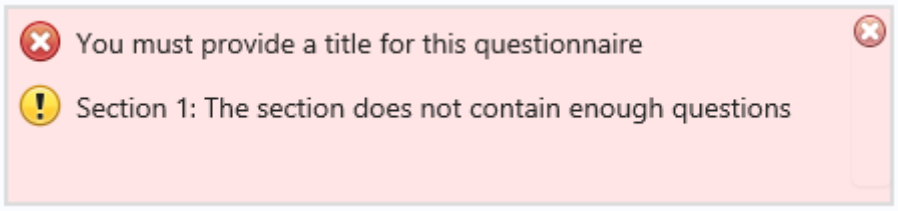
When multiple questions are selected from a single section, each question is copied and added to the end of the section.

When multiple sections are selected, an exact copy of the selected section is made. The new section appears below all the existing sections and contains all the questions contained in the original section.

Copied sections and questions have the same name as the original with *(Copy)* appended to the name.

12.12.3. Validate

Click *Validate* to validate the Questionnaire. If the Questionnaire *fails* validation, the reasons for failure are listed in a red pane below the Questionnaire. This pane can be closed by clicking the '**X**' in the top right corner. This pane is closed automatically once all the errors have been rectified.



There are two types of message displayed:

Error messages – indicate information is missing which will prevent the Questionnaire from being saved. Error messages have the following icon.

Validation messages – indicate information is missing which will prevent the Questionnaire from being Published. Validation messages have the following icon.

Click on the error message or validation message to open the screen which contains the error.

The error messages and resolutions are described in Table 35.

TABLE 35. Error Messages

Error Message	Description
You must provide a name for this questionnaire	The Questionnaire does not have a name. Click on the error message and then enter a name in the *Name* box.
You must provide a description for this questionnaire	The Questionnaire does not have a description. Click on the error message and then enter a description in the *Description* box.

TABLE 35. Error Messages

Error Message	Description
You must provide a revision description for this questionnaire	The Questionnaire does not have a revision description. Click on the error message and then enter a revision description in the *Revision description* box.
You must provide a title for this questionnaire	The Questionnaire does not have a title. Click on the error message and then enter a title in the *Title* box.
The question's name must be unique within the section	Two or more questions within the same section have the same text. Edit the *Question text* of the questions to ensure they are unique.
The section name must be unique within the questionnaire	Two or more sections have been created with the same *Section name*. Edit one or more *Section names* to ensure all the sections have unique names.

The validation failure messages and resolutions are described in Table 36.

TABLE 36. Validation Failed Messages

Validation Message	Description
At least one section must be created	The Questionnaire contains no sections. Right-click on the Questionnaire title and select *Add a section* from the menu. You must then add questions to the section.
No child questions defined for the matrix header question	A question has been set as a matrix question, but no child questions have been created. Either right-click on the question and select *Convert to standalone question* from the menu (if you do not want this question to be a matrix question), or select *Add a child question*.
No options have been specified for the question	A Selection, rating scale or matrix question has been created which does not contain any options. Click on the error message and then right-click on the question and select *Add selection option* from the menu.
No standout answer group specified for the question	The question has been set to support Standout answers, but none of the answers have been added to a Standout answer group. Either right-click on the question and select *Disable standout answers* from the menu (if you do not want this question to support Standout answers), or select one or more of the answers to this questions and assign them to a Standout answer group.
The number of questions per page cannot be less than one	The *Questions per page* is set to *0*. Click on the error message and then select *Questions per page and* enter a value which is *greater* than 0, or select *All* from the drop-down list.
The option must be a valid date when the question input type is date	The question is an Input date type. However, a date has not been specified as the answer. Click on the error and select a date from the calendar.

TABLE 36. Validation Failed Messages

Validation Message	Description
The option text cannot be blank	The input type question which is configured to support Standout answers has no text for the Standout answer option. Either right-click on the question and select *Disable standout answers* from the menu, or select the option which has been added to the question and enter the text for the Standout answer.
The question text cannot be blank	The question is blank. Click on the error message then double-click on the blank question and enter the question text.
The section does not contain enough questions	The section contains no questions. Click on the error message and then either add questions to the section or, if the section is not required, delete the empty section.
The section name cannot be blank	The section has no name. Click on the error message and then enter a name in the *Section name* box.
The selection option text cannot be blank	An option has been added to either a rating scale question or to a Selection type question, but there is no text for the option. Select the option and add an answer to the Text box.
There can only be a single default selection for this question	A Selection question has been created with more than one default answer. Decide which answer you want to be selected by default and then right-click on the other options and select *Clear this option by default* from the menu.

When the Questionnaire passes validation, the message *No error or validation problems found* is displayed.

12.12.4. Save & Preview

Click *Save & preview* to save and display the Questionnaire as it will appear when it is Published. If there are any errors which prevent the Questionnaire from being saved, these errors must be resolved before you can preview the Questionnaire. See "Validate" on page 215 for more information on errors and validation errors.

Click *Start Questionnaire* and then navigate through the Questionnaire.

The preview can be closed either by clicking the *Submit* button at the end of the Questionnaire, or by closing the browser window.

Note: When *previewing* a Questionnaire, clicking *Submit* does *not* submit the Questionnaire. It just shows the Questionnaire creator the same screens as the recipients will see when this Questionnaire is sent to them and they start the Questionnaire.

12.12.5. Save

Click *Save* to save the changes made to the Questionnaire. If there are any errors which prevent the Questionnaire from being saved, these errors must be resolved before you can save the Questionnaire. See "Validate" on page 215 for more information on errors and validation errors.

12.12.6. Close

Click *Close* to close the *Questionnaire management* window.

Note: We recommend you save the Questionnaire before clicking *Close* or unsaved changes will be lost.

12.13. Icons

Icons are used in the Questionnaire explorer to indicate settings for questions and answers. These icons are described in Table 37.

TABLE 37. Questionnaire Explorer Icons

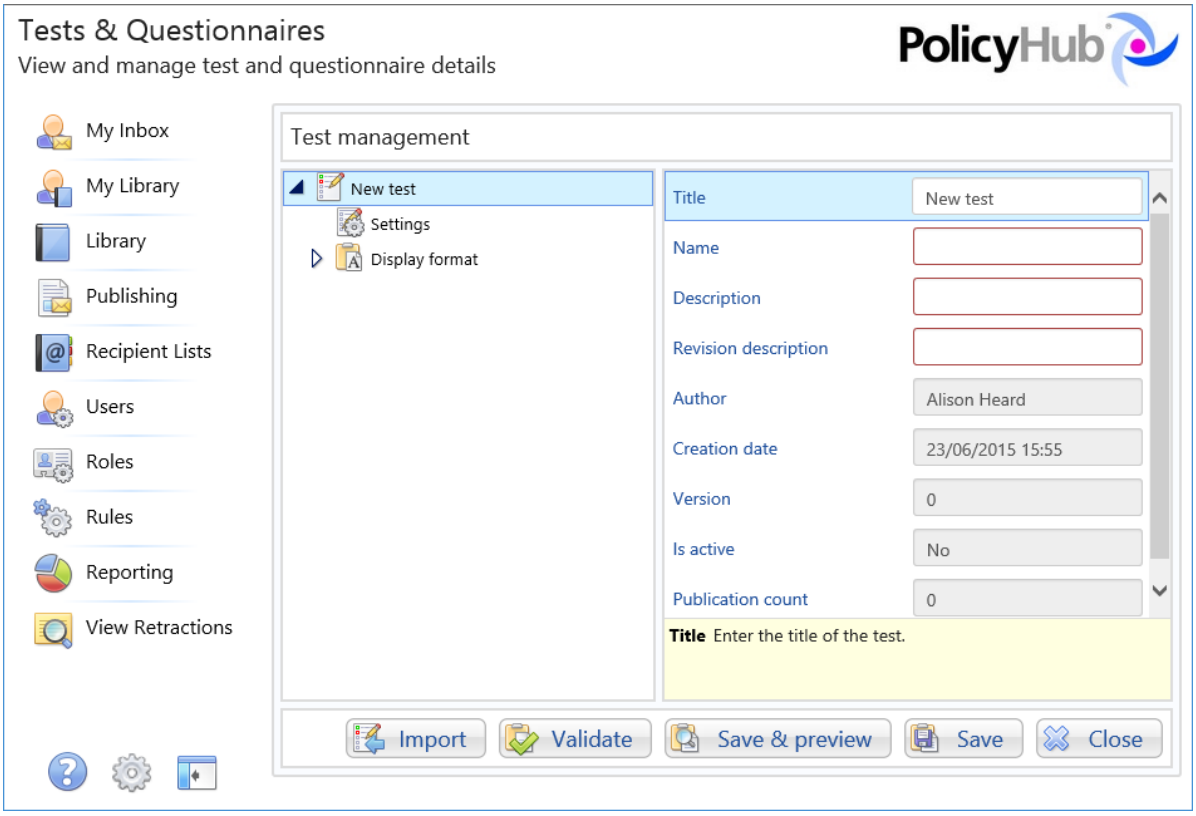
Icon	Description
Question Icons	
	Indicates this question is an Input question.
	Indicates this question is a Selection question.
	Indicates this question is a Matrix question.
	Indicates this question is a Rating question.
	Indicates the question is Mandatory. Mandatory questions must be answered before the Questionnaire can be submitted. **Note:** This icon is combined with other question icons. For example, indicates an Input type question which is Mandatory.
Answer Icons	
	Indicates the answer is a Selection answer.
	Indicates this answer is selected by default.
	Indicates this is a Text answer which must be typed in a text box.

TABLE 37. Questionnaire Explorer Icons

Icon	Description
	Indicates this is a Date answer which must be selected from a calendar.
	Indicates this answer is a Standout answer. **Note:** This icon is combined with other answer icons. For example, indicates a Selection answer which branches to a different question and is a Standout answer.
	Indicates that this answer will branch to a later question in this section, to a later section in this Questionnaire or to the end of the Questionnaire. **Note:** This icon is combined with other answer icons. For example, indicates a Selection answer which branches to a different question and is a Standout answer.

13. Tests

When you edit or create a Test, the *Test management* page is opened.



13.1. Test Properties

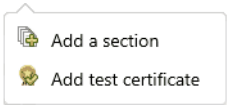
Select the Test title (or *New test* if you are creating a new Test). The items shown are described in Table 38.

TABLE 38. Test Properties

Item	Description
Title	Enter the title of the Test. This will appear on the first and last pages of the Test.
Name	The name of the Test.
Description	The description given to the Test
Revision description	The description given to this revision of the Test.
Author	The name of the person who created this revision of the Test.
Creation date	The date the revision was created.
Version	The version number assigned to this revision of the Test.
Is active	*Yes* indicates this is the Active revision of the Test. *No* indicates this is not the active revision of this Test.
Publication count	The number of times this revision of the Test has been Published.

13.2. Test Menu

Right-click on the Test title to display the menu.

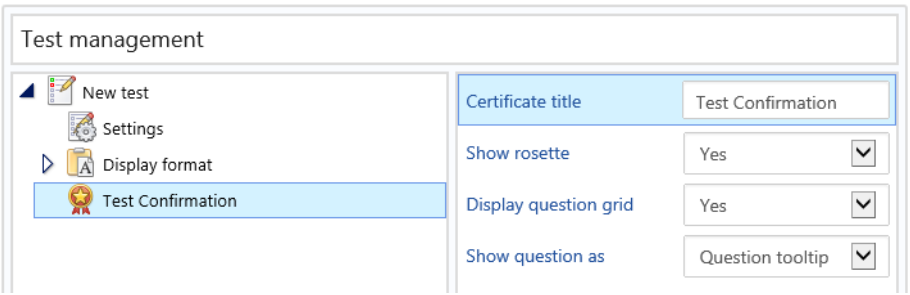


13.2.1. Add A New Section

Select *Add a new section* from the menu to create a new Test section. The new section is displayed below *Display format*. See "Section Properties" on page 225 for more details on setting the section properties.

13.2.2. Add Test Certificate

Select *Add test certificate* if you want respondents to be shown a certificate on completion of the Test. To configure the Test certificate, select the Test certificate in the Test explorer.



See "Test Confirmation" on page 225 for information on the Test certificate properties.

13.2.3. Remove Test Certificate

Select *Remove test certificate* if you no longer want respondents to see a Test certificate on completion of the Test.

13.3. Settings

Select *Settings*. Select the Test title. The items shown are described in Table 39.

TABLE 39. Settings

Item	Description
Questions per page	*All* – all the questions in the Test are displayed on a single page. *Other* – configure the number of questions you want to appear on a page. Questions from different sections will appear on different pages. *Questions per page* has a maximum value of 10.
Start-up comments	Enter comments you want to appear on the first page of the Test, under the information about taking the Test.

TABLE 39. Settings

Item	Description
Allow display of question answers	*Yes* – after submitting the Test, the *View Test Results* button is displayed at the bottom of the Test submission page enabling the respondent to view their marked Test. **Note:** When *Allow display of question answers* is set to *Yes*, both *Display test score* and *Display test result* are set to *Yes* and cannot be changed. *No* – the respondent cannot view their marked Test.
Allow printing of question answers	*Yes* – a print button is added to the page displaying their marked Test enabling the respondent to print the answers. *No* – the respondent cannot print their marked Test. **Note:** This option is set to *No* when *Allow display of question answers* is set to *No*.
Use same questions for re-test	This option determines whether, when a recipient is allowed to re-take the Test after failing it, the Test contains the same questions as the original Test or whether new questions are presented. **Note:** To ensure recipients receive different questions in a Test re-take, you must also ensure that the Test contains more sections than the value for *Sections to include* and/or the Test contains more questions in a section than the value for *Questions to include*. See "Create A Test Which Can Have Different Questions For Each User" on page 45 for more information.
Display test score	*Yes* – allow the respondent to see the percentage they scored on their Test. *No* – the respondent cannot see the percentage they scored on their Test. **Note:** This option is set to *Yes* and cannot be changed when either a Test certificate has been added or when Allow display of question answers is set to *Yes*.

TABLE 39. Settings

Item	Description
Display test result	*Yes* – allow the respondent to see whether they passed or failed the Test. *No* – the respondent is not told whether they passed or failed the Test. **Note:** This option is set to *Yes* and cannot be changed when either a Test certificate has been added or when Allow display of question answers is set to *Yes*.
Sections to include	*All* – all the sections in the Test are included in the Test. *Random* – a random selection of sections are included in the Test. In the box, enter the number of sections the Test should include. This setting allows the Test creator to create a Test which can be different for each of the recipients.
Test time	Enter the number of hours and minutes you want to allow the respondents to take the Test.
Extra time	Optional: Enter the number of hours and minutes of extra time (in addition to the Test time) you want to give the respondents to take the Test. *Extra time* is not displayed until the Test time has counted down to zero. Once the *Test time* has reached zero, if *Extra time* is configured, it is shown in red and counts down to zero.

13.4. Display Format

The options in the *Display format* section are described in Table 40.

TABLE 40. Display Format

Item	Description
Background colour	Sets the background (page) colour.
All sections	
Font	When *Display section description as heading* is set to *Yes*, this option sets the font for section description.
Background colour	When *Display section description as heading* is set to *Yes*, this option sets the background colour for the text.
Font colour	When *Display section description as heading* is set to *Yes*, this option sets the font colour for the text.
Display section description as heading	When set to *Yes*, the section description is used as a heading on each page of the Test. When set to No, the section description is not used as a heading on each page and the font and colour settings here are ignored.

TABLE 40. Display Format

Item	Description
All questions	
Font	Sets the font used for the questions.
Background colour	Sets the background colour for the question text.
Font colour	Sets the font colour for the question text.
All answers	
Font	Sets the font used for the selection and rating answers.
Background colour	Sets the background colour for the answer text.
Font colour	Sets the font colour for the answer text.

13.5. Test Confirmation

Select *Test Confirmation* (or the Test certificate title if you have changed the default title). The items shown are described in Table 41.

TABLE 41. Test Certificate Properties

Item	Description
Certificate title	Enter the text you want to appear as the title of the Test certificate.
Show rosette	*Yes* – a rosette is included on the Test certificate. *No* – a rosette is not included on the Test certificate.
Display question grid	*Yes* – the questions are displayed in a grid on the Test certificate. *No* – questions are not included in the Test certificate.
Show question as	*Question text* – the questions are shown in the grid on the Test certificate. *Question tooltip* – the tooltips for each question are shown in the grid on the Test certificate instead of the Test questions.

13.6. Section Properties

Select the section title in the left pane. The options shown are described in Table 42.

TABLE 42. Section Properties

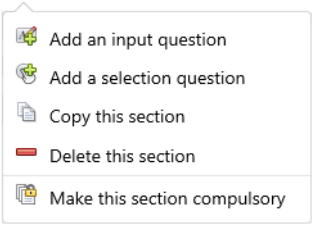
Item	Description
Section name	Enter the name of the selected section. This is used as the title of the section in the Test.
Section description	Optional: Enter a description of the selected section.

TABLE 42. Section Properties

Item	Description
Compulsory	*Yes* – when *Sections to include* is set to *Random*, set *Compulsory* to *Yes* to ensure the selected section is always included in the Test. *No* – when *Sections to include* is set to *Random*, set *Compulsory* to No to make the inclusion of the selected section random. When *Sections to include* is set to *All*, the setting for *Compulsory* is ignored.
Questions to Include	*All* – all the questions in the selected section are included in the Test. *Random* – a random selection of questions from the section are included in the Test. In the box, enter the number of questions the Test should include. This setting allows the Test creator to create a Test which can be different for each of the recipients.

13.7. Section Menu

Right-click on the section name to display the menu.



13.7.1. Add An Input Question

Select *Add an input question* to add a new Input type question to the section. The new Input type question appears below the existing questions in the selected section. See "Question Properties" on page 227 for more information about Input questions.

13.7.2. Add A Selection Question

Select *Add a selection question* to add a new Selection type question to the section. The new Selection type question appears below the existing questions in the selected section. See "Question Properties" on page 227 for more information about Selection questions.

13.7.3. Copy This Section

Select *Copy this section* to create an exact copy of the selected section. The new section appears below all the existing sections, contains all the questions contained in the original section and has the same name as the original section with *(Copy)* appended to the name.

13.7.4. Delete This Section

Select *Delete this section* to delete the selected section and all the questions in it.

13.7.5. Make This Section Compulsory

Select *Make this section compulsory* to ensure that, when *Sections to include* is set to Random, this section is always included in the Test.

13.8. Question Properties

Select the question in the left pane. The options shown are described in Table 43.

TABLE 43. Question Properties

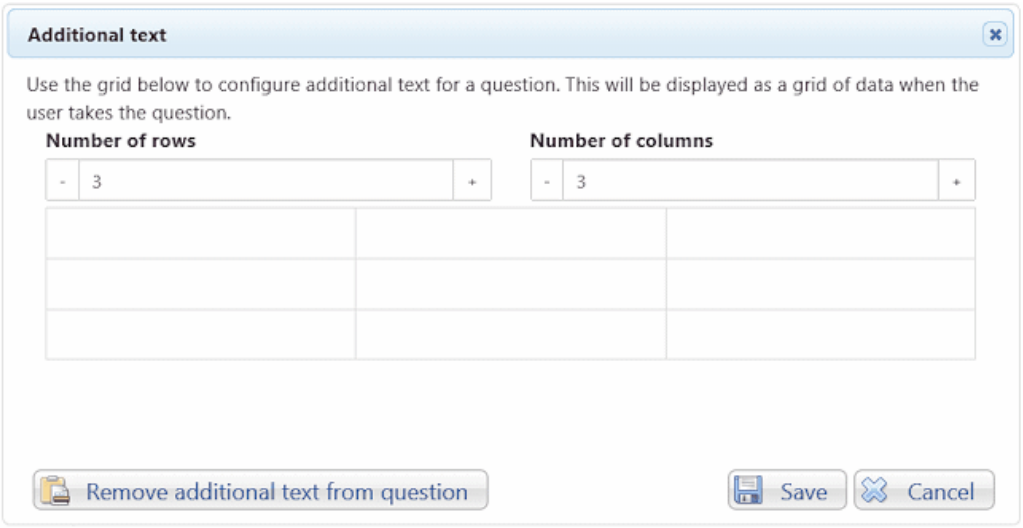
Item	Description
Question text	Enter the question, as you want it to appear.
Question tooltip	Enter more information about the question which will be active on roll over of the question text.
Question type	*Input* – the answer to the question must be typed in to a text box or selected from a calendar. *Selection* – the answer to the question must be selected from a list of options.
Input type	*Text* – the answer to the question must be typed into a text box. *Date* – the answer to the question must be selected from a calendar.
Score	Enter the number of marks to be awarded for correctly answering this question.
Compulsory	*Yes* – when *Questions to include* is set to *Random*, set *Compulsory* to *Yes* to ensure the selected question is always included in the Test. *No* – when *Questions to include* is set to *Random*, set *Compulsory* to *No* to make the inclusion of the selected question random. When *Questions to include* is set to *All*, the setting for *Compulsory* is ignored.
Mandatory	*Yes* – the respondent will not be allowed to submit the Test until this question has been answered. *No* – the respondent can submit the Test with this question left unanswered.
Allow multiple answers	*Yes* – there is more than one correct answer to a multiple choice question. *No* – the respondent can select one answer only.

TABLE 43. Question Properties

Item	Description
Score answers individually	*Yes* – allow the respondent to score some points, even when some of their selections are incorrect. *No* – the respondent will not score any points for a question unless all the answer selection are correct for that question.
Additional text	Additional text can be added to a question when more information must be presented in the Test. Click on the text **Click here to add** to open the *Additional text* dialog. See "Additional Text Dialog" on page 228 for more information.

13.8.1. Additional Text Dialog

The additional text dialog enables you to add more information to a question in tabular form.



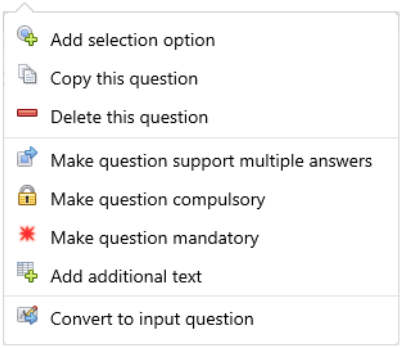
Set the number of rows and the number of columns required for the additional text. Enter the required information in the grid.

Click *Save* to save the changes or *Cancel* to exit without saving the changes.

Click *Remove additional text* from the question to delete the additional text from this question.

13.9. Question Menu

Right-click on a question to display the question menu.



13.9.1. Add Selection Option

Add a new selection option to this Selection question.

13.9.2. Add An Answer

Add an answer to the currently selected Input question.

13.9.3. Copy This Question

Select *Copy this question* to copy the selected question. The new question appears below all the existing questions in this section, contains all the options contained in the original question and has the same name as the original question with *(Copy)* appended to the name.

13.9.4. Delete This Question

To delete a question from the database, select the question you want to delete, right-click on it and select *Delete this question* from the menu.

13.9.5. Make Question Support Multiple Answers

The respondent can currently select just one answer for this Selection question. Select *Make question support multiple answers* if you want the respondent to be able to select more than one answer.

13.9.6. Make Question Support A Single Answer

The respondent can currently select more than one answer for this Selection question. Select *Make question support a single answer* if you want the respondent to be able to select just one answer.

13.9.7. Make Question Compulsory

Select *Make question compulsory* to ensure the selected question is always included in the Test.

Note: When *Questions to include* is set to *All*, this setting is ignored.

13.9.8. Make Question Not Compulsory

Select *Make question not compulsory* to make the inclusion of the selected question random.

Note: When *Questions to include* is set to *All*, this setting is ignored.

13.9.9. Make Question Mandatory

Select *Make question mandatory* to ensure that all respondents must answer this question before submitting the Test.

13.9.10. Make Question Not Mandatory

Select *Make question not mandatory* if you want respondents to be allowed to submit the Test without answering this question.

13.9.11. Add Additional Text

Additional text can be added to a question when more information must be presented in the Test.

Select *Add additional text* to open the *Additional text* dialog. See "Additional Text Dialog" on page 228 for more information.

13.9.12. Remove Additional Text

Select *Remove additional text* to remove the Additional text which has been added to the selected question.

13.9.13. Convert To Date

The selected Input type question currently has the *Input type* set to *Text*. Select *Convert to date* if you want to change the *Input type* to *Date*.

13.9.14. Convert To Text

The selected Input type question currently has the *Input type* set to *Date*. Select *Convert to text* if you want to change the *Input type* to *Text*.

13.9.15. Convert To Input Question

Select *Convert to input question* to change the current question from a Selection question to an Input question.

13.9.16. Convert To Selection Question

Select *Convert to selection question* to change the current question from an Input question to a Selection question.

13.10. Answer Properties

Select the answer in the pane on the left. The *input* options are described in Table 44.

TABLE 44. Answer Properties – Input

Item	Description
Answer	Enter the answer.
Case sensitive	This option determines whether the respondent needs to enter an answer which matches the text *and* the case of the *Answer*, or whether the answer must just match the text of the *Answer*. *Yes* – this text answer must be entered with the same capitalisation as the *Answer* (above) for the answer to be marked as correct. *No* – this text answer can be entered with any capitalisation.

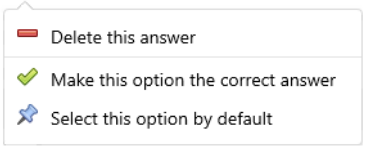
Select the answer in the pane on the left. The *selection* options shown are described in Table 45.

TABLE 45. Answer Properties – Selection

Item	Description
Text	Enter the answer option, as you want it to appear.
Tooltip	Enter more information about the question which will be active on roll over of the question text.
Selected by default	This option determines which (if any) of the supplied selection options are selected by default. *Yes* – this answer is selected by default in the Test. *No* – this answer is not selected by default in the Test. **Note:** The number of answers which are selected by default cannot be higher than the number of answers which are set as the correct answer.
Correct answer	*Yes* – this is the correct answer to the question. *No* – this is not the correct answer to the question. **Note:** When *Allow multiple answers* is set to *No*, only one answer can have Is *Answer* set to *Yes*. If more than one answer is set to *Yes*, the Test will not pass validation.

13.11. Answer Menu

Right-click on an answer to display the answer menu.



13.11.1. Delete This Answer

Delete the selected answer.

13.11.2. Make This Option The Correct Answer

The selected option is the correct answer to the question.

13.11.3. Make This Option An Incorrect Answer

The selected option is not the correct answer to the question.

13.11.4. Select This Option By Default

This option will be selected by default in the Test.

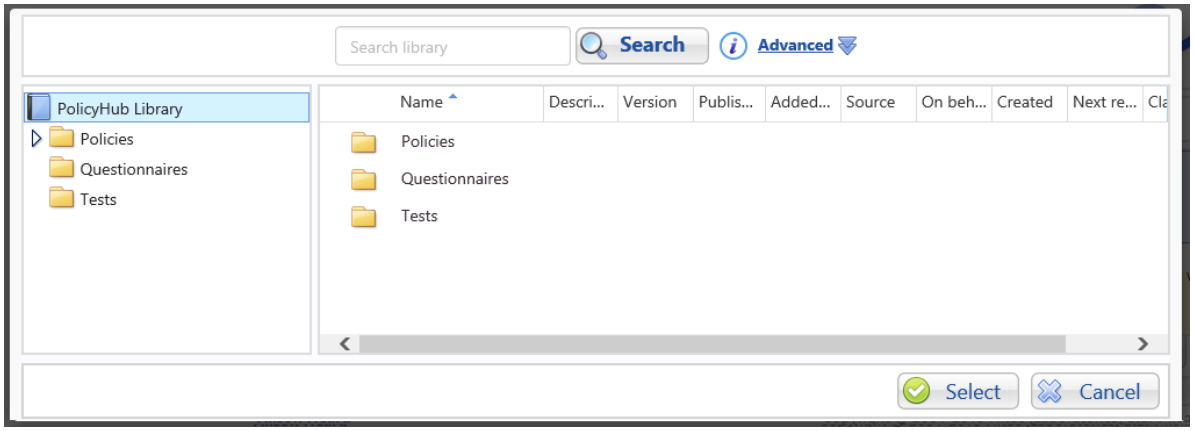
13.11.5. Clear This Option By Default

This option will not be selected by default in the Test.

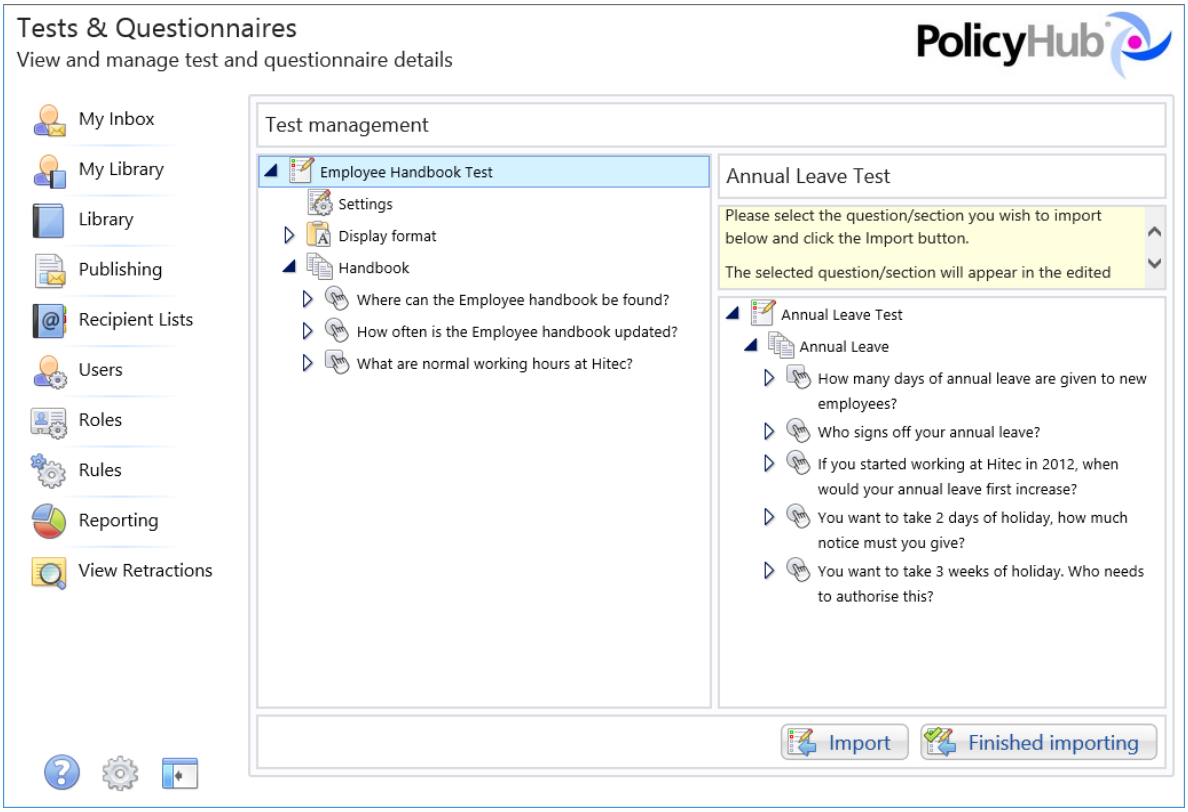
13.12. Buttons

13.12.1. Import

Click *Import* to import a whole section or an individual question from an existing Test into the Test being edited. The library is opened allowing you to browse to the folder containing the Test you want to import.

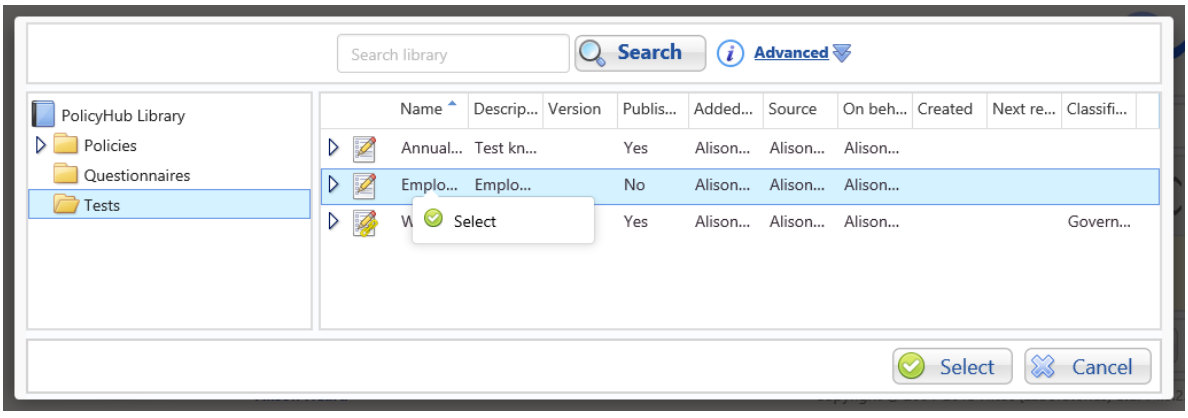


When you have browsed to the correct folder, select the Test you want to import and click *Select*. (Alternatively, see "Test Menu", below, for a right-click menu option.) The latest revision of the selected Test is opened. The selected Test is displayed in the panel on the right.



13.12.1.1. Test Menu

After clicking the *Import* button and browsing to the folder containing the Test you want to import, right-click on a Test to see the menu.



Click *Select* in the right-click menu to open the selected Test. The latest revision of the selected Test is opened.

13.12.1.2. Import A Section

To import a whole section of the Test in the panel on the right into the Test being edited, you must select a section or the Test title in the panel on the left and you must select the section you want to import from the panel on the right. Click *Import*. (To import multiple questions, use the *Ctrl* key while selecting the questions and then click *Import*.)

The selected section on the right is imported into the Test and appears as the last section in the edited Test.

Continue until you have imported all the required Test sections and questions and then click *Finished Importing*. You are returned to the Test editing window.

13.12.1.3. Import A Question

To import a single question from the Test in the panel on the right to the Test being edited, you must select a section in the pane on the left and you must select the question you want to import from the panel on the right. Click *Import*. (To import multiple questions, use the *Ctrl* key while selecting the questions and then click *Import*.)

Note: You must select the section you want a question to be imported into. If this is a new Test, first create a section, then select the section and click *Import*.

The selected question on the right is imported into the Test and appears as the last question in the selected section of the edited Test.

Continue until you have imported all the required Test sections and questions and then click *Finished Importing*. You are returned to the Test editing window.

13.12.2. Copy

The *Copy* button is used to copy multiple sections or multiple questions. To select consecutive items, hold down the *Shift* key and select the first and the last item. To select non-consecutive items, hold down the *Ctrl* key and select each item.

When multiple questions are selected from different sections, each question is copied to its own section only and added to the end of the section.

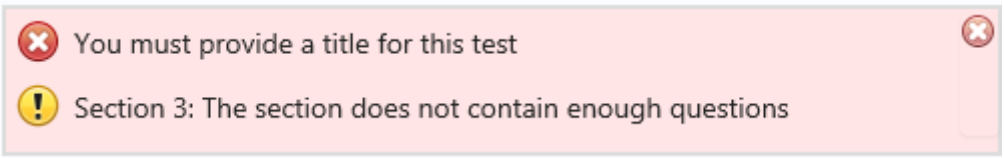
When multiple questions are selected from a single section, each question is copied and added to the end of the section.

When multiple sections are selected, an exact copy of the selected section is made. The new section appears below all the existing sections and contains all the questions contained in the original section.

Copied sections and questions have the same name as the original with *(Copy)* appended to the name.

13.12.3. Validate

Click *Validate* to validate the Test. If the Test *fails* validation, the reasons for failure are listed in red pane below the Test. This pane can be closed by clicking the '**X**' in the top right corner. This pane is closed automatically once all the errors have been rectified.



There are two types of message displayed:

Error messages – indicate information is missing which will prevent the Test from being saved. Error messages have the following icon.

Validation messages – indicate information is missing which will prevent the Test from being Published. Validation messages have the following icon.

Click on the error message or validation message to open the screen which contains the error.

The error messages and resolutions are described in Table 46.

TABLE 46. Error Messages

Error Message	Description
You must provide a name for this test	The Test does not have a name. Click on the error message and then enter a name in the *Name* box.
You must provide a description for this test	The Test does not have a description. Click on the error message and then enter a description in the *Description* box.
You must provide a revision description for this test	The Test does not have a revision description. Click on the error message and then enter a revision description in the *Revision description* box.
The test title cannot be blank	The Test does not have a title. Click on the error message and then enter a title in the *Title* box.
The section name must be unique within the test	Two or more sections have been created with the same *Section name*. Edit one or more *Section names* to ensure all the sections have unique names.
The question's name must be unique within the section	Two or more questions within the same section have the same text. Edit the *Question text* of the questions to ensure they are unique.

The validation failure messages and resolutions are described in Table 47.

TABLE 47. Validation Failed Messages

Validation Message	Description
At least one section must be created	The Test contains no sections. Right-click on the Test title and select *Add a section* from the menu. You must then add questions to the section.
No answer has been specified for the question	There are no answers for the question. Click on the error and then create an answer for the question.
No correct answer has been specified for the question	None of the answers to the question have been set as the correct answer. Click on the error message, right-click on the correct answer and select *Make this option the correct answer* from the menu.
No options have been specified for the question	A selection question has been created which does not contain any options. Click on the error message and then right-click on the question and select *Add selection option* from the menu.

TABLE 47. Validation Failed Messages

Validation Message	Description
Not enough time has been allocated for this test	The *Test time* must be at least 1 minute. Click on the error message and then set the *Test time* to give the respondents enough time to complete the Test.
The number of questions per page cannot be less than one	The *Questions per page* is set to *0*. Click on the error message and then select *Questions per page and* enter a value which is *greater* than 0, or select *All* from the drop-down list.
The number of random questions to include cannot be less than one	*Questions to include* is set to *Random*, but the value is set to *0*. Click on the error message and then *either*, leave *Questions to include* set to *Random* but enter a value greater than 0 in the number box, or, set *Questions to include* to *All*.
The number of random questions to include cannot be more than the actual number of questions in the section	*Questions to include* is set to *Random*, but the value is set higher than the number of questions in the section. Click on the error and enter a number in the box which is less than the number of questions in the section.
The number of random sections to include cannot be less than one	*Sections to include* is set to *Random*, but the value is set to 0. Click on the error message and then *either*, leave *Sections to include* set to *Random* but enter a value greater than 0 in the number box, or, set *Sections to include* to *All*.
The number of random sections to include cannot be more than the actual number of sections	*Sections to include* is set to *Random*, but the value is set higher than the number of sections in the Test. Click on the error and enter a number in the box which is less than the number of sections in the Test.
The option must be a valid date when the question input type is date	The question is an Input date type. However, a date has not been specified as the answer. Click on the error and select the correct date from the calendar.
The option text cannot be blank	An answer has been added to an input type question, but there is no text for the answer. Select the option and add an answer to the Text box or select a date from the calendar (as appropriate).
The question text cannot be blank	A question has been created with no text. Click on the error message, double-click on the empty question and enter the question text.
The score for any question cannot be less than one	Click on the error and then enter a value equal to or greater than 1 for the *Score*.
The section does not contain enough questions	The section contains no questions. Click on the error message and then either add questions to the section or, if the section is not required, delete the empty section.
The section name cannot be blank	The section has no name. Click on the error message and then enter a name in the *Section name* box.
The selection option text cannot be blank	An option has been added to a selection type question, but there is no text for the option. Click on the error message then double-click on the blank option and enter the option text.

TABLE 47. Validation Failed Messages

Validation Message	Description
There can only be a single default selection for this question	A selection question has been created with more than one default answer. Decide which answer you want to be selected by default and then right-click on the other options and select *Clear this option by default* from the menu.
You must provide a title for this certificate	The Test certificate does not have a title. Click on the error message and then double-click on the Test certificate icon and enter a title in the text box.
The option must be text when the question input type is text	The question is an Input text type. However, a date has been specified as the answer. Click on the error and then enter a non-date answer. Alternatively, right-click on the questions and select *Convert to date* from the menu if you want the answer to be a date.

When the Test passes validation, the message *No errors or validation problems found* is displayed.

13.12.4. Save & Preview

Click *Save & preview* to save and display the Test as it will appear when it is Published. If there are any errors which prevent the Test from being saved, these errors must be resolved before you can preview the Test. See "Validate" on page 234 for more information on errors and validation errors.

Click *Start Test* and then navigate through the Test.

The preview can be closed either by clicking the *Submit* button at the end of the Test, or by closing the browser window.

Note: When *previewing* a Test, clicking *Submit* does *not* submit the Test. It just shows the Test creator the same screens as the recipients will see when this Test is sent to them and they start the Test.

13.12.5. Save

Click *Save* to save the changes made to the Test. If there are any errors which prevent the Test from being saved, these errors must be resolved before you can save the Test. See "Validate" on page 234 for more information on errors and validation errors.

13.12.6. Close

Click *Close* to close the *Test management* window.

Note: We recommend you save the Test before clicking *Close* or unsaved changes will be lost.

13.13. Icons

Icons are used in the Test explorer to indicate settings for questions and answers. These icons are described in Table 48.

TABLE 48. Test Explorer Icons

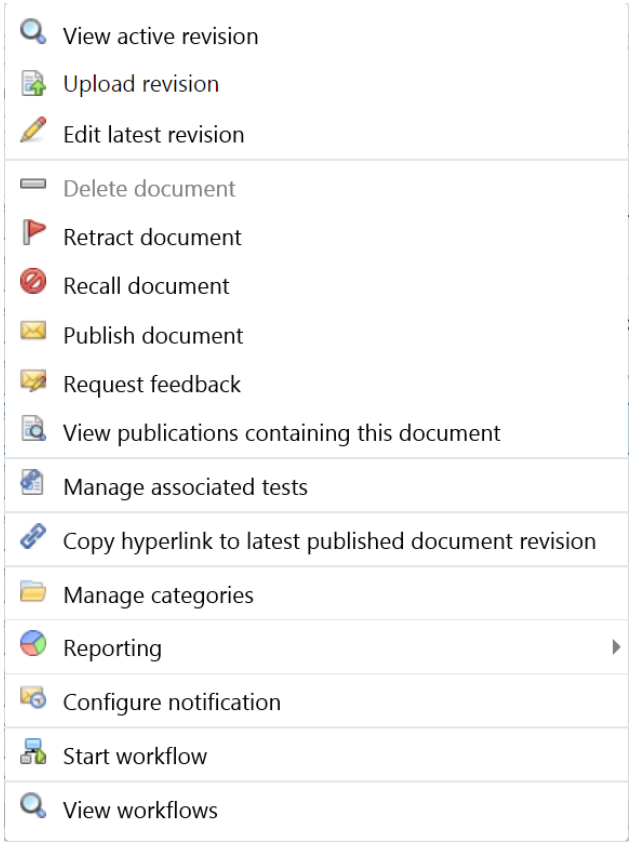
Icon	Description
Question Icons	
	Indicates the question is an Input question.
	Indicates the question is a Selection question.
	Indicates the question is Mandatory. Mandatory questions must be answered before the Test can be submitted. **Note:** This icon is combined with other question icons. For example, indicates an Input type question which is Mandatory.
	Indicates the question is Compulsory. Compulsory questions are always included in a Test which has been configured with random questions. **Note:** This icon is combined with other question icons. For example, indicates an Input type question which is Compulsory.
Answer Icons	
	Indicates the answer is a Selection answer.
	Indicates this answer is selected by default.
	Indicates this is a Text answer which must be typed in a text box.
	Indicates this is a Date answer which must be selected from a calendar.

14. Publications List

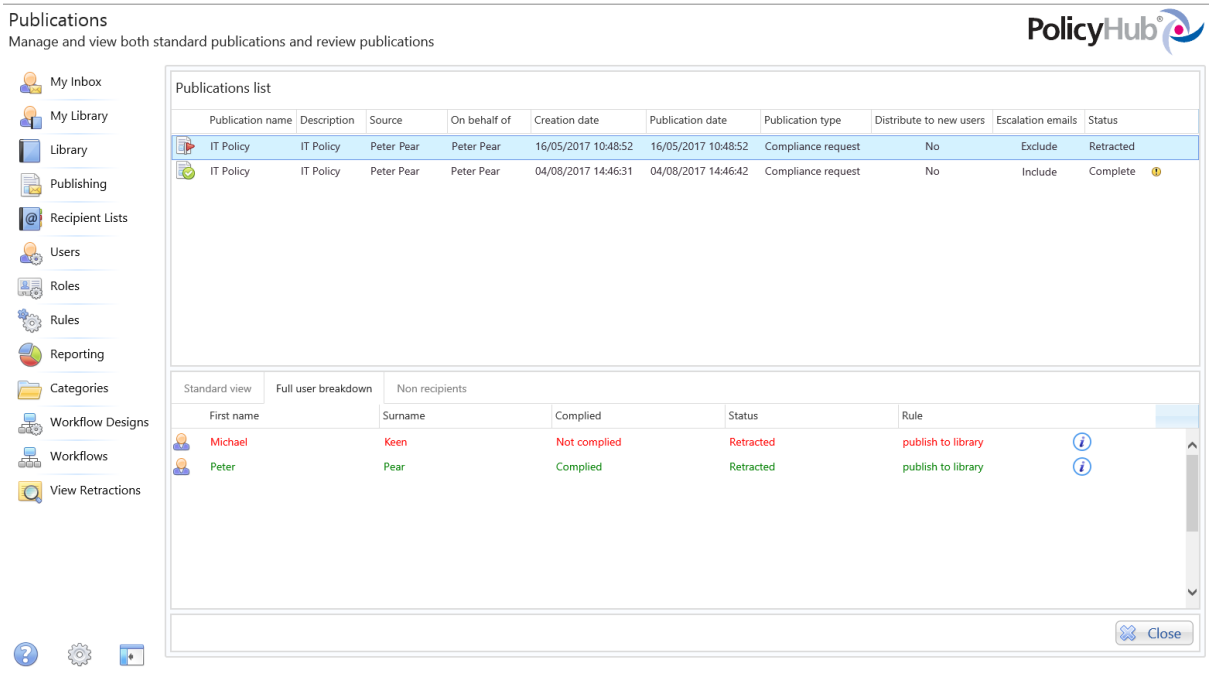
14.1. View Publications Containing This Document

To view the *Publications List*, right-click on a document in the Library.

From the *Document* menu, select *View publications containing this document*.



The *Publications List* view lists all the Publications which have been created which include the document you selected in the library.



The column headings in the Publications List view above are described in Table 49.

TABLE 49. Publications List

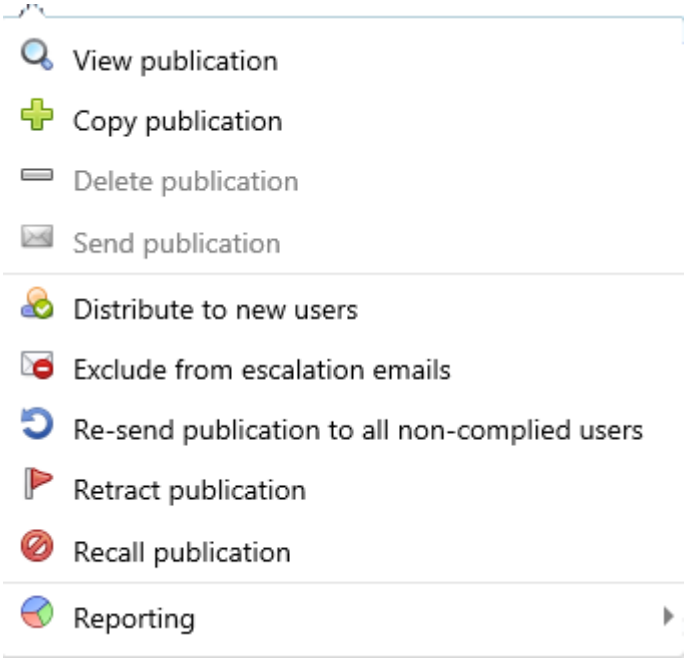
Term	Description
Type	The icon indicates the type of Publication. indicates a complete Compliance Publication. indicates a complete Review Publication. indicates a saved (draft) Compliance Publication. indicates a saved (draft) Review Publication. indicates a recalled Publication. indicates a retracted Publication.
Publication name	The name given to the Publication.
Description	The description given to the Publication.
Source	The name of the person or department identified as the source of the Publication.
On behalf of	The name of the person or department the Publication was sent on behalf of.
Creation date	The date the Publication was created.
Publication date	The date the Publication was sent.
Publication type	*Compliance request* indicates it was a Compliance Publication. *Review request* indicates it was a Review Publication.
Distribute to new users	*Yes* indicates the Publication has the *Distribute to new users* option set. *No* indicates the Publication does not have the *Distribute to new users* option set. See "Distribute To New Users" on page 288 for more information on this option.

TABLE 49. Publications List

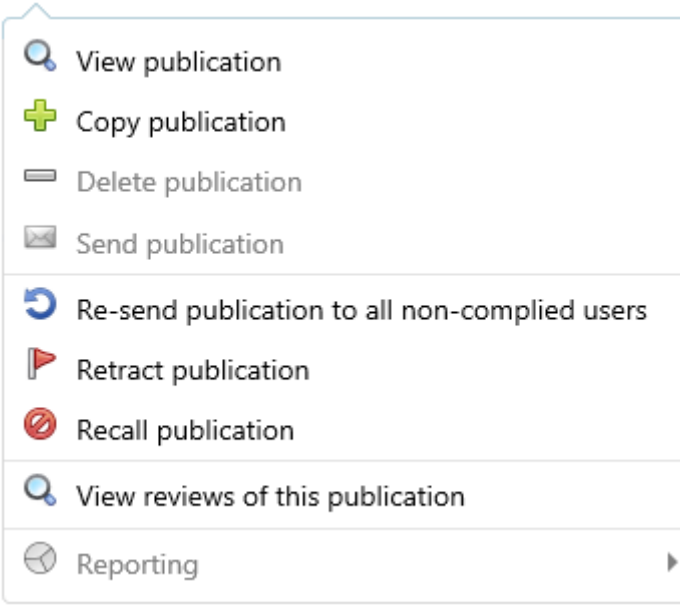
Term	Description
Escalation emails	*Exclude* indicates the publication will not be included in the list of non-compliant publications displayed within the managers escalation email. This is the default setting for *Escalation emails*. *Include* indicates the publication will be included in the list of non-compliant publications displayed within the managers escalation email. Selecting this option will also enable the publication to be completed after the rule has expired. This cannot be undone. See "Enable Manager Escalation Emails" on page 89 for further information. **Note:** Depending on your PolicyHub licence, *Escalation emails* may not appear in the Publications List view
Status	*In progress* indicates the Publication has not yet been completed by all the recipients. *Error* indicates the Publication has not been sent as an error was encountered. *Complete* indicates the Publication has been completed by all recipients (or the time in which it had to be completed has expired). *Still to be published* indicates it was saved as a draft Publication and has not yet been sent. *Retracted* indicates the Publication was retracted because the documents included in it were no longer relevant. *Recalled* indicates the Publication was recalled because it had been sent in error.
	This icon appears in the Status column when a publication has not reached one or more of the intended recipients. This may be because the recipients' email address is incorrect or the person has left the company and the email address has been deactivated.

14.2. Publication Menu

Right-click on a *Publication* to display the Publications menu.



When a *Review Publication* is selected, the following menu is displayed.



Note: The menu items displayed for a draft Publication differ from the menu items displayed for a complete Publication.

Note: Depending on your PolicyHub licence, *View feedback for this publication* may appear in the menu instead of *View reviews of this publication*.

14.2.1. Edit Publication

Select *Edit publication* to edit the selected Publication. The *Edit Draft Publication* page is opened and all the options can be changed, as required.

Note: This option is not available for Publications with the Status *Complete* or in *Error* as these Publications have already been sent.

14.2.2. View Publication

Select *View publication* to display all the settings used in the selected Publication. All the settings can be seen but no settings can be changed.

Note: This option is not available for Publications with the Status *Still to be published* as these Publications have not yet been sent.

14.2.3. Copy Publication

Select *Copy publication* to create a copy of the selected Publication. The new Publication has all the settings as the original Publication but has the Status *Still to be published*. The new Publication can then be edited and sent or sent as it is.

Note: If the Publication contains a Recipient List which has been *de-activated*, the de-activated Recipient List will be removed from the copied Publication.

14.2.4. Delete Publication

Select *Delete publication* to delete the selected Publication. Only Publications which have not yet been sent can be deleted.

Note: This option is only available for Publications which have the status *Still to be published.*

14.2.5. Send Publication

Select *Send publication* to send the selected Publication. Only Publications which have not yet been sent can be sent.

Note: If you want to verify the Publication settings before you send the Publication, use the *Edit publication* menu option to view the Publication and make any required changes before you send the Publication.

Note: This option is only available for Publications which have the status *Still to be published.*

14.2.6. Distribute To New Users

Select this option to change the *Distribute to new users* setting. When *Distribute to new users* is currently set to *No*, select this option to ensure the selected Publication is sent to new Users. A dialog is displayed asking you to confirm you want to start distributing the Publication to new Users. Select *Yes* to enable the option or *No* to cancel.

When *Distribute to new users* is currently set to *Yes*, select this option to stop the selected Publication being sent to new Users. A dialog is displayed asking you to confirm you want to stop distributing the Publication to new Users. Select *Yes* to stop distributing the Publication to new Users or *No* to cancel.

See "Distribute To New Users" on page 288 for a full description of this option.

Note: This option is not available for Publications which have the status *Still to be published*. This is because this option can be enabled on the *Edit Draft Publication* page.

14.2.7. Exclude From Escalation Emails

Select this option to exclude the Publication from the managers escalation email for any User that has not complied.

The *Exclude from escalation emails* menu is only available if the Publication is set to I*nclude in escalation emails.*

Note: Depending on your PolicyHub licence, the *Exclude from escalation emails* menu option may not be available in your application software.

14.2.8. Include in Escalation Emails

Select this option to include the Publication from the managers escalation email for any User that has not complied. See "Enable Manager Escalation Emails" on page 89 for further information.

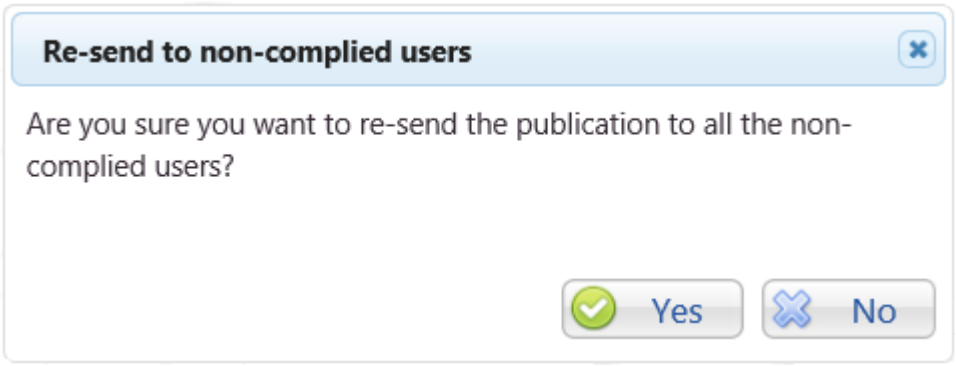
Selecting this option will also enable the publication to be completed after the rule has expired. This cannot be undone.

The *Include in escalation emails* menu is only available if the Publication is set to *Exclude from escalation emails.*

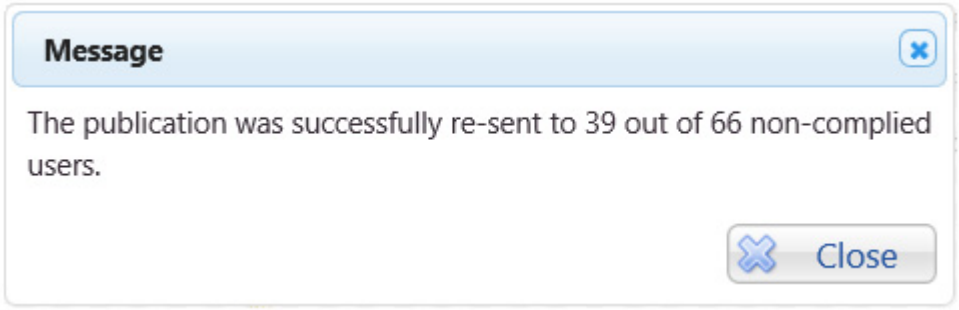
Note: Depending on your PolicyHub licence, the *Include in escalation emails* menu option may not be available in your application software.

14.2.9. Re-send Publication To All Non-Complied Users

Select this option to re-send the publication only to those recipients who did not complete one or more of the items included in the Publication within the allotted time or number of Test retries.



Click *Yes* to re-send the Publication to all non-complied users or click *No* to close the dialog without re-sending the Publication.



A dialog is displayed indicating how many users were re-sent the Publication.

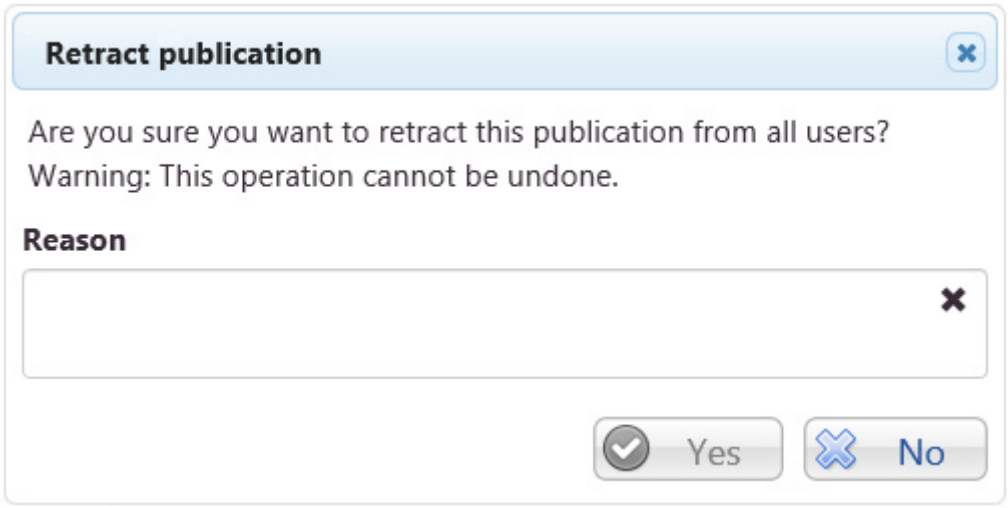
Note: This option is not available for Publications which have the status *Still to be published*. This is because this option can be enabled on the *Edit Draft Publication* page.

14.2.9.1. Retract Publication

Select *Retract publication* when the Publication is no longer relevant. For example, the Publication might have been sent out a number of years ago, but none of the documents are now required. This option removes the selected Publication from the Inbox of each recipient. If the Publication has already been completed by a recipient, the document revisions included in the Publication are removed from the recipients' libraries.

The option *Retract publication* is dimmed for Publications which have the status *Still to be published*.

A dialog is displayed.



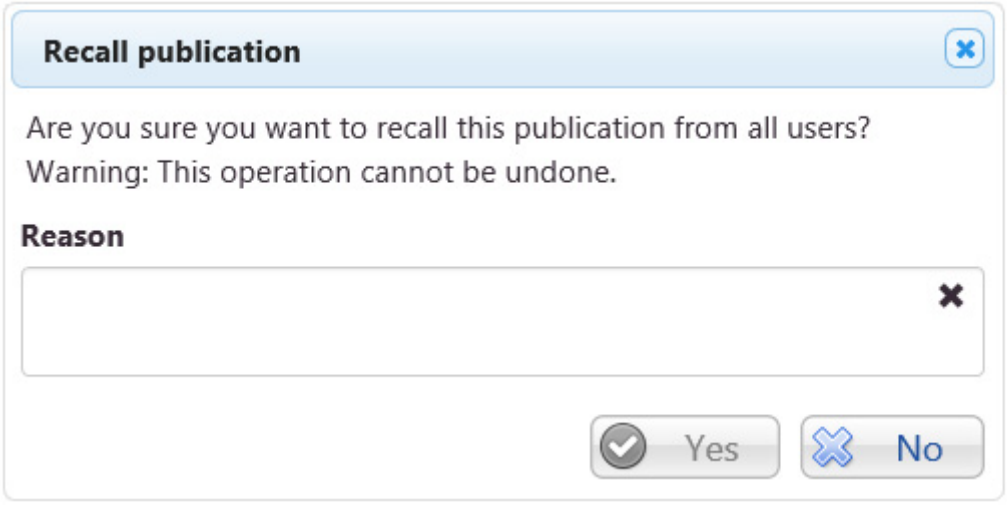
Enter the reason for retracting the Publication. This reason will be displayed on the *Retracted Documents* page. Click *Yes* to withdraw the Publication, or *No* to cancel the retraction.

14.2.9.2. Recall Publication

Select *Recall publication* when the Publication was sent in error. This option removes the selected Publication from the Inbox of each recipient. If the Publication has already been completed by a recipient, the document revisions included in the Publication are removed from the recipients' libraries.

The option *Recall publication* is dimmed for Publications which have the status *Still to be published*.

A dialog is displayed.



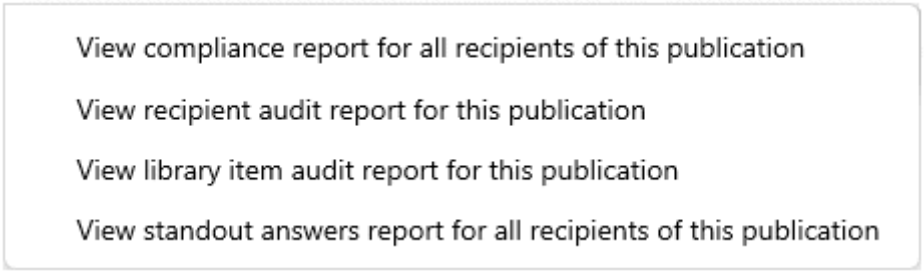
Enter the reason for recalling the Publication. This reason will be displayed on the *Retracted Documents* page. Click *Yes* to recall the Publication, or *No* if you do not want to recall the publication.

Select *View reviews of this publication* to open the *View Document Reviews* page. See "Reviews" on page 276 for a description of viewing the comments and changes returned by reviewers.

Note: Depending on your PolicyHub licence, *View feedback for this publication* may appear in the menu instead of *View reviews of this publication*.

14.2.10. Reporting

Select a Publication in the Publications list, right-click on it and select *Reporting*. The following menu is displayed.

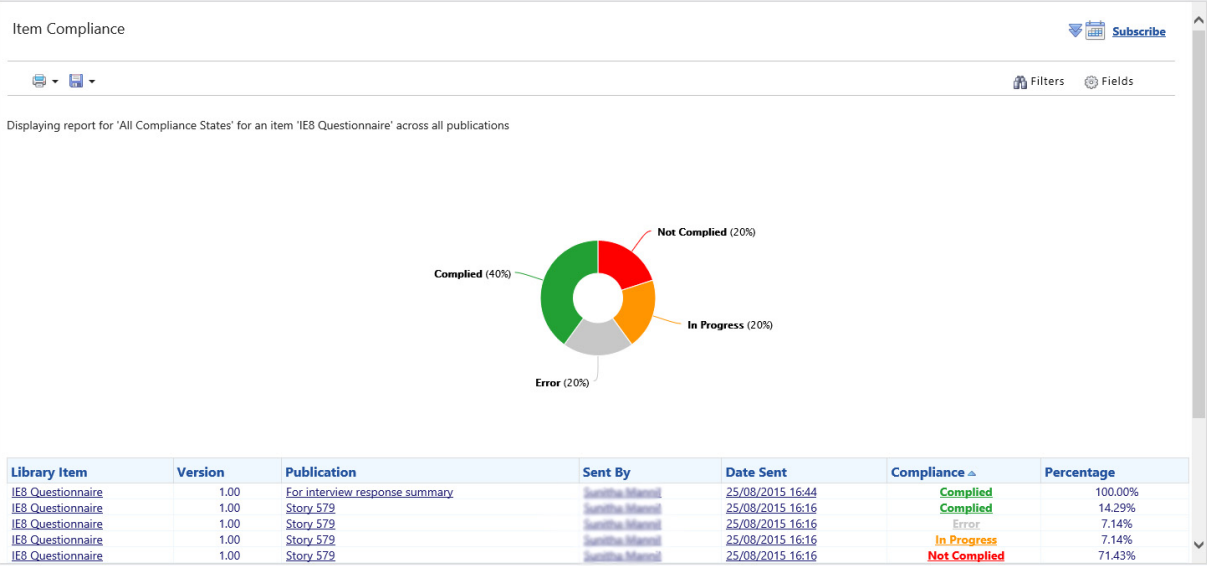


When selected, each menu item will generate a report. To investigate in more detail, click on any of the active links (underlined text) in the report.

Note: A report toolbar is displayed on each report. See “Report Toolbar” on page 363 for a description of the toolbar.
Each report includes a *Filters* tab which displays or hides filters which can be used to refine the report. For more information about adding and or changing filtering options, see “Date Filters” on page 371, “Additional Filtering Options” on page 372 and “Changing the Default Filtering Option” on page 373.
Each report also has the capability to sort data within each column. For more information See “Sorting Report Data Within Columns” on page 376.
The reports also include a *Fields* tab which displays or hides fields which can also be used to refine the report. For more information see “Adding/Removing Columns From Reports” on page 376. Large reports contain a tool bar to navigate between report pages. For more information See “Report Pagination” on page 377.
The *Subscribe* button enables the User to create a report subscription. For more information see “Creating Subscriptions” on page 380.

14.2.10.1. View Compliance Report For All Recipients Of This Publication

The chart shows the percentage of recipients who *Complied*, are *In Progress*, have *Not Complied* or for whom there was an *Error* (as appropriate) for each item in the selected Publication.



The column headings in the above report are described in Table 50

TABLE 50. Item Compliance Report

Item	Description
Library Item	The name of the Document, Questionnaire or Test you right-clicked in the library. Active Link. Click to display the *Item Compliance* report for the selected library item for all Publications.
Version	The version of the document which was included in the Publication.
Publication	The name of the Publication this version of the document was published with, on the date shown. Active Link. Click to display the *Item Compliance* report for the selected Document, Questionnaire or Test for the selected Publication only.
Sent By	The name of the person who published this version of the document on the date shown. Active Link. Click to see the *Publication Compliance* report for the selected user. See “Publication Compliance Report” on page 367 for more information.
Date Sent	The date the Publication was sent. Active Link. Click to see the *Publication Compliance* report for all Publications sent on the selected date. See “Publication Compliance Report” on page 367 for more information.

TABLE 50. Item Compliance Report

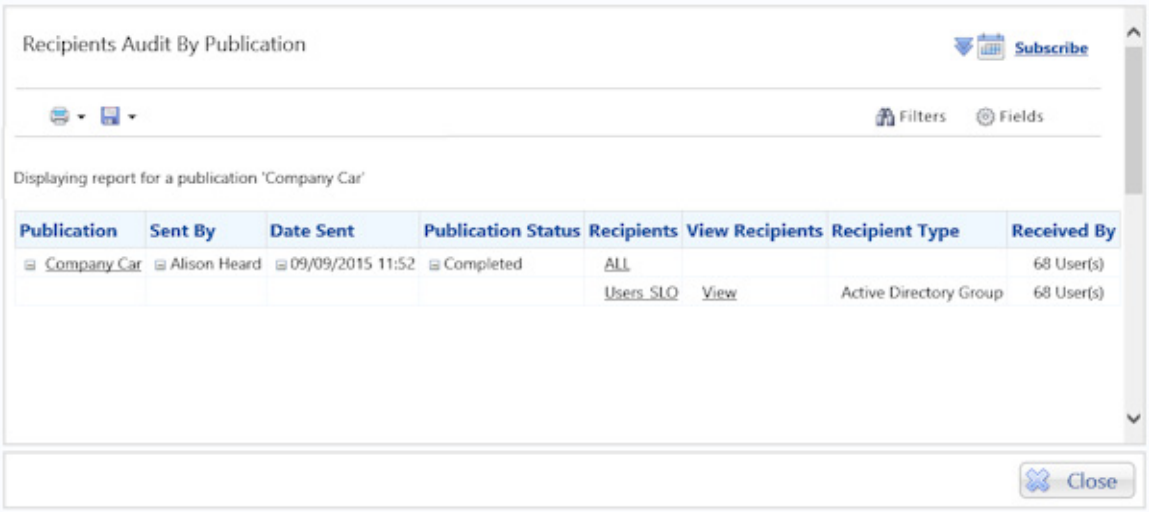
Item	Description
Compliance	The compliance status (Complied, In Progress, Not Complied or in Error) of this Document. Active Link. Click to display the *User Action* report for the selected users and the selected Compliance Status. See "User Action Report" on page 270 for more information.
Percentage	The percentage of recipients of the Publication with the compliance state shown.
Publication Status (Hidden by default)	Publications have the status *Completed* when: • They have been complied with by all recipients. • The rule used for Publication has expired. • They were Published directly into user library. Publications are *Active* when there are still some outstanding publications to be complied with and the rule has not expired. Publications have the status *Error* when they weren't sent because of an error. Publications have the status *Retracted* when the Publication was *Retracted*. Publications have the status *Recalled* when the Publication was *Recalled*.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click *Close* to return to the Publications list.

14.2.10.2. View Recipient Audit Report For This Publication

This report shows the number of recipients of the selected Publication and whether or not the Publication is complete.



The column headings in the above report are described in Table 51.

TABLE 51. Recipients Audit By Publication Report

Item	Description
Publication	The name of the Publication selected on the *Publications* page. Active Link. Click on the Publication name to view the *Publication Information* report for the selected Publication. See "Publication Information Report" on page 252 for information.
Sent By	The name of the person who sent out the Publication.
Date Sent	The date and time the Publication was sent.
Publication Status	Publications have the status *Completed* when: • They have been complied with by all recipients. • The rule used for Publication has expired. • They were Published directly into user library. Publications are *Active* when there are still some outstanding publications to be complied with and the rule has not expired. Publications have the status *Error* when they weren't sent because of an error. Publications have the status *Retracted* when the Publication was *Retracted*. Publications have the status *Recalled* when the Publication was *Recalled*.

TABLE 51. Recipients Audit By Publication Report

Item	Description
Recipients	The name of the Users, Recipient Lists and Active Directory Groups to whom the Publication was sent. Active Link. Click a user name to see the *Library Item Audit By Recipients* report for the selected user. See "Library Item Audit By Recipients Report" on page 330 for more information Click on a Recipient List to see the *Library Item Audit By Recipients* report for the selected recipient list. Click on an Active Directory Group name to see to see the *Library Item Audit By Recipients* report for the selected active directory group.
View Recipients	Click *View* to open the report for the selected Recipient. When a user is selected, the *User Information* report for the selected user is displayed. See "User Information Report" on page 121 for more information. When a Recipient List is selected, the *Library Item Audit By Recipients* report for the selected *Recipient List* is displayed. See "Library Item Audit By Recipients Report" on page 330 for more information. When an Active Directory Group is selected, the *Library Item Audit By Recipients* report for the selected *Group* is displayed. See "Library Item Audit By Recipients Report" on page 330 for more information.
Recipient Type	When the name in the *Recipients* box is a recipient user, *User* is displayed. When the name in the *Recipients* box is a recipient list, *Recipient List* is displayed. When the name in the *Recipients* box is an Active Directory group, *Active Directory Group* is displayed.
Received By	The number of recipients belonging to the Recipient List or Group. When the Recipient is a User, *1 User(s)* is displayed.

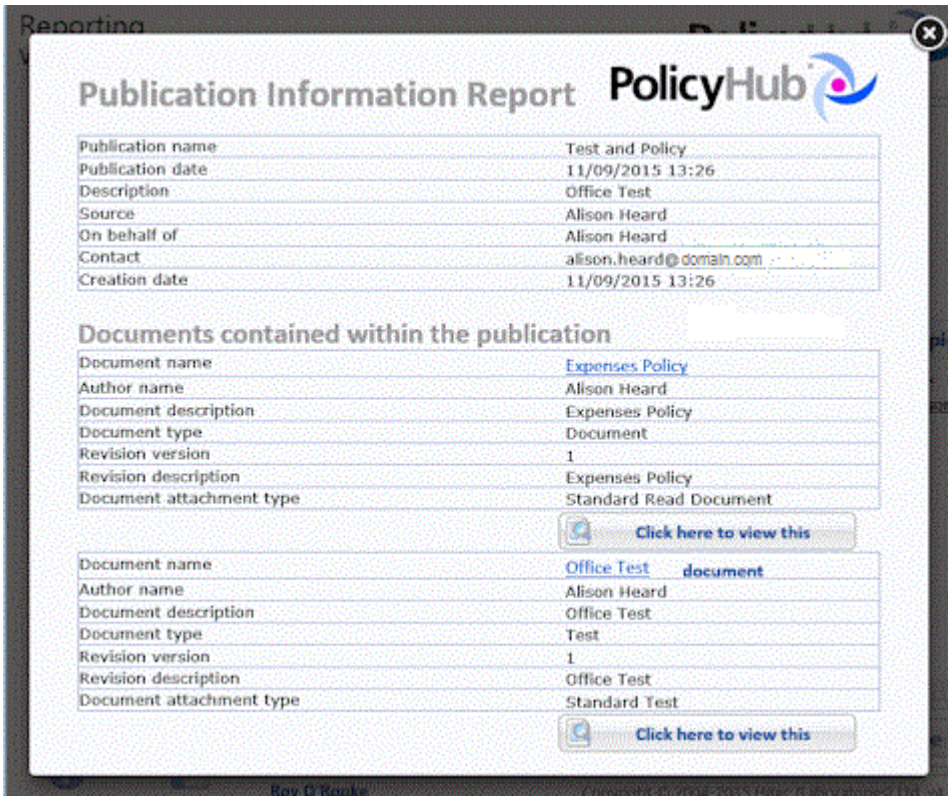
Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click *Close* to return to the Publications list.

14.2.10.3. Publication Information Report

The Publication Information report shows all the information configured for the Publication on the *Build New Publication* page. To view the Publication Information report, generate a Library Item Audit By Publication report, see "View Library Item Audit Report For This Publication" on

page 254. In the report Publication column, select the active link (underlined text) which will open the Publication Information report.



The headings in the above report are described in Table 52.

TABLE 52. Publication Information Report

Item	Description
Publication name	The name of the Publication selected on the *Publications* page.
Publication date	The date the Publication was sent.
Description	The description given to the Publication on the *Build New Publication* page.
Source	The name entered in the Source field on the *Build New Publication* page.
On behalf of	The name entered in the On Behalf Of field on the *Build New Publication* page.
Contact	The information entered in the Contact field on the *Build New Publication* page.
Creation date	The date the Publication was created. This is often the same as the Publication Date. However, when a draft is created, the Creation Date is the date the draft publication was saved.
Documents contained within the publication	
Document name	The name of a document included in the publication.
Author name	The name of the person who created this version of the document.

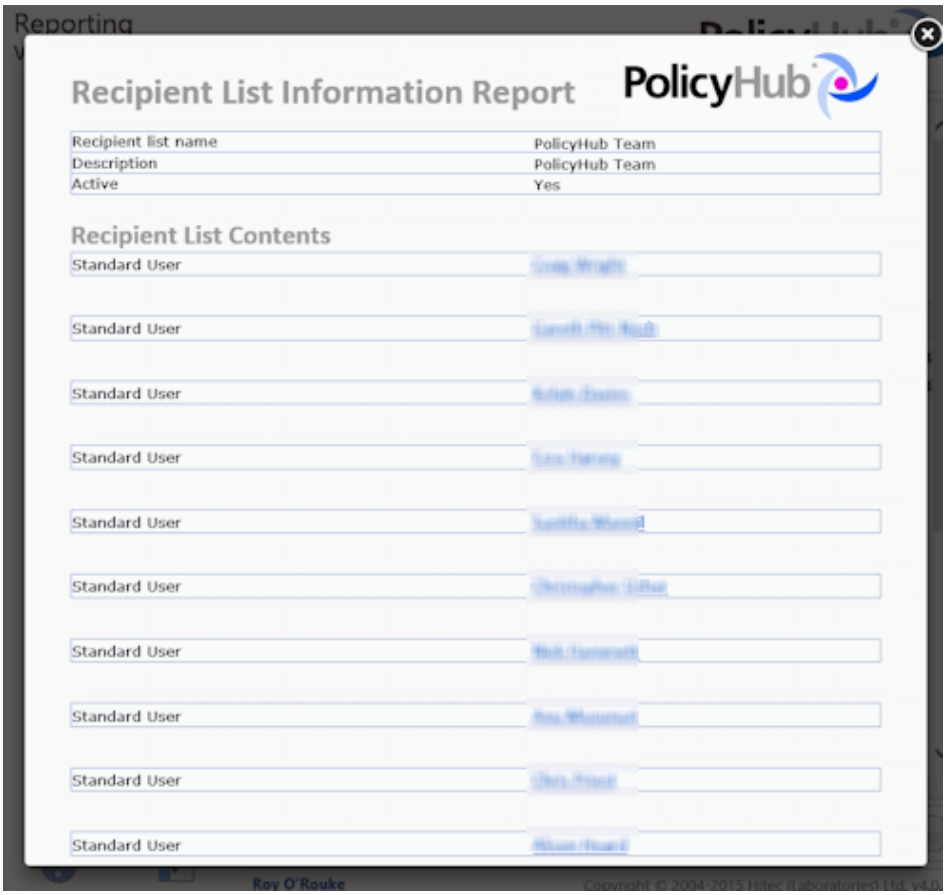
TABLE 52. Publication Information Report

Item	Description
Document description	The description given to the original version of the document.
Document type	Standard Documents (such as Policies) and Questionnaires both have the Document Type *Document.* Tests have the Document Type *Test*.
Revision version	The version of the document included in the publication.
Revision description	The description given to this version of the document.
Document attachment type	Standard documents (such as Policies) have the Document Attachment Type *Standard Read Document* Questionnaires have the Document Attachment Type *Standard Questionnaire* Tests have the Document Attachment Type *Standard Test*
Click here to view this document	Click to view the document.

Click the Publication Information Report's '**X**' icon, in the top right-hand corner, to return to the report.

14.2.10.4. Recipient List Information Report

The Recipient List Information report shows all the information configured for the Recipient List. To open the report, select the active link (underlined text) in the "Publication Audit By Recipient Lists Report" on page 304.



The headings in the above report are described in Table 53.

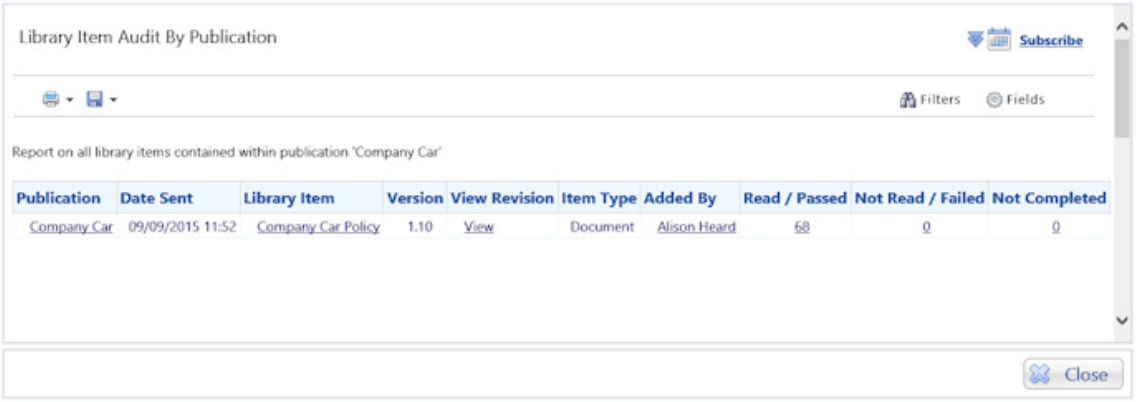
TABLE 53. Recipient List Information Report

Item	Description
Recipient list name	The name of the selected Recipient List.
Description	The description of the Recipient List.
Active	Yes indicates the Recipient List is active. No indicates the User account is still active.
Recipient List Contents	
Standard Group	The name of each Active Directory Group which belongs to the selected Recipient List. Active Link. Click on a Group name to display the *Group Information* report for the selected Group. See "View Publications Containing This Document" on page 239 for details.
Recipient List Name	The name of each Recipient List which belongs to the selected Recipient List. Active Link. Click on a Recipient List name to display the *Recipient List Information* report for the selected Recipient List.
Standard User	The name of each user which belongs to the selected Recipient List. Active Link. Click on a name to display the *User Information* report for the selected user. See "User Information Report" on page 121 for more information.

Click the Recipient List Information Report's '**X**' icon, in the top right-hand corner, to return to the report.

14.2.10.5. View Library Item Audit Report For This Publication

This report shows the number of recipients who read the Document or responded to the Questionnaire or Passed the Test and the number of recipients who did not read the Document or respond to the Questionnaire or who Failed the Test which was sent as part of the selected Publication.



The column headings in the above report are described in Table 54.

TABLE 54. Library Item Audit By Publication Report

Item	Description
Publication	The name of the Publication selected on the *Publications* page. Active Link. Click the Publication name to see the *Publication Information* report for the Publication. See "Publication Information Report" on page 251 for more information.
Date Sent	The date the Publication was sent.
Library Item	The name of the Document, Questionnaire or Test included in the Publication. Active Link. Click to open the *General Library Item* report for this Document, Questionnaire or Test. See "General Library Item Report" on page 256 for more information.
Version	The version of the document included in this publication.
View Revision	Active Link. Click *View* to view the selected Document revision or *Preview* to preview the selected Test or Questionnaire revision.
Item Type	Policy Documents have the Item Type *Document.* Questionnaires have the Item Type *Questionnaire*. Tests have the Item Type *Test.*
Added By	The name of the person who uploaded or edited this version of the Document, Questionnaire or Test. Active Link. Click to open the *User Information* report for the selected user. Report. See "User Information Report" on page 121 for information.
Read / Passed	The number of people who read the Document or responded to the Questionnaire, or who passed the Test. Active Link. Click to see the *General Library Item* report for the Document in the selected Publication which has been read, the Questionnaires which has been taken or the Test which has been passed. See "General Library Item Report" on page 256 for more information.
Not Read / Failed	The number of people who did not read the Document or respond to the Questionnaire or who failed the Test and the time specified by the distribution rule has not yet expired. Active Link. Click to see the *General Library Item* report for the Document in the selected Publication which has not yet been read, the Questionnaires which has not yet been taken or the Test which has not yet been passed. See "General Library Item Report" on page 256 for more information.

TABLE 54. Library Item Audit By Publication Report

Item	Description
Not Completed	The number of people who did not read the Document or respond to the Questionnaire or who failed the Test and the time specified by the distribution rule *has expired*. Active Link. Click to see the *General Library Item* report for the Document in the selected Publication which was not read, the Questionnaires which was not taken or the Test which was not passed before the Publication expired. See "General Library Item Report" on page 256 for more information.
Publication Status (Hidden by default)	Publications have the status *Completed* when: • They have been complied with by all recipients. • The rule used for Publication has expired. • They were Published directly into user library. Publications are *Active* when there are still some outstanding publications to be complied with and the rule has not expired. Publications have the status *Error* when they weren't sent because of an error. Publications have the status *Retracted* when the Publication was *Retracted*. Publications have the status *Recalled* when the Publication was *Recalled*.

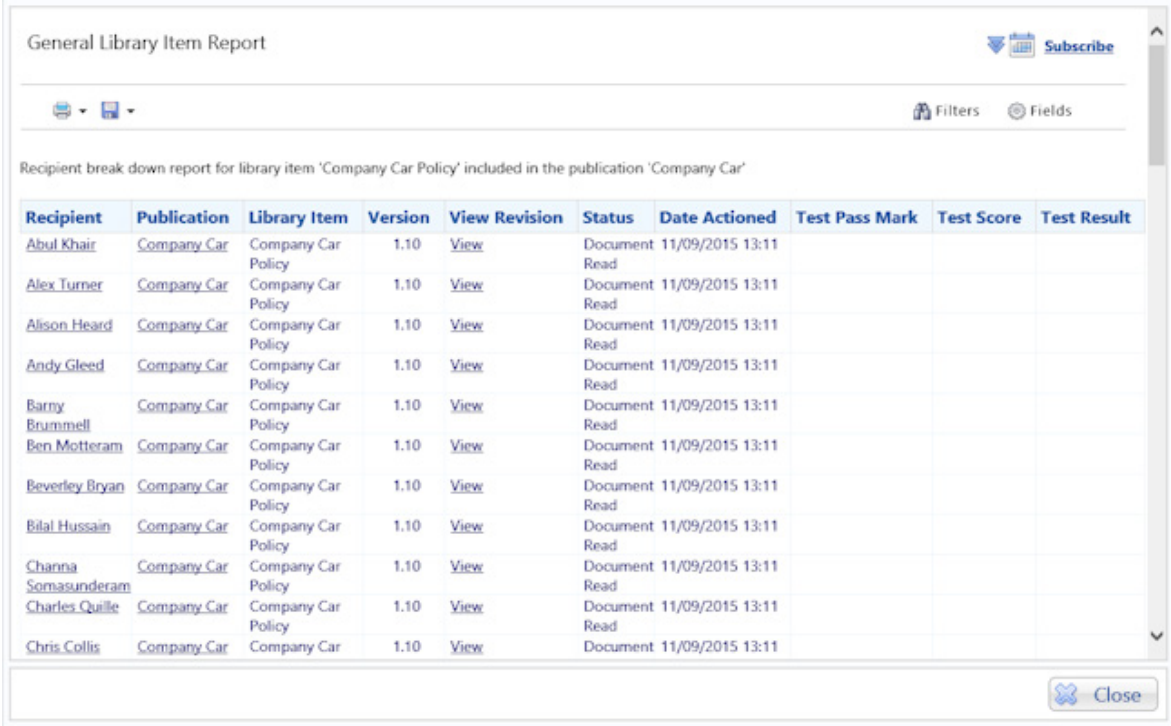
Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click *Close* to return to the Publications list.

14.2.10.6. General Library Item Report

This report is displayed when, from the *Publications list* page, the user selects *View library item audit report for this publication* (see "View Library Item Audit Report For This Publication" on page 254) then, clicks a library item in the report.

This report shows the library item status for each recipient of the selected library item for the selected Publication.



The column headings in the above report are described in Table 55.

TABLE 55. General Library Item Report

Item	Description
Recipient	The name of a recipient of the library item in the Publication. Active Link. Click to display the *User Information* report for the selected user. See "User Information Report" on page 121 for more information.
Publication	The name of the Publication selected on the *Publications list* page. Active Link. Click to display the *Publication Information* report for the selected Publication. See "Publication Information Report" on page 252 for more information.
Library Item	The name of the Document, Questionnaire or Test included in the Publication which was clicked in the *Library Item Audit By Publication* report.
Version	The version of the Document, Test or Questionnaire included in this publication.
View Revision	Active Link. Click *View* to view the selected Document revision or *Preview* to preview the selected Test or Questionnaire revision.

TABLE 55. General Library Item Report

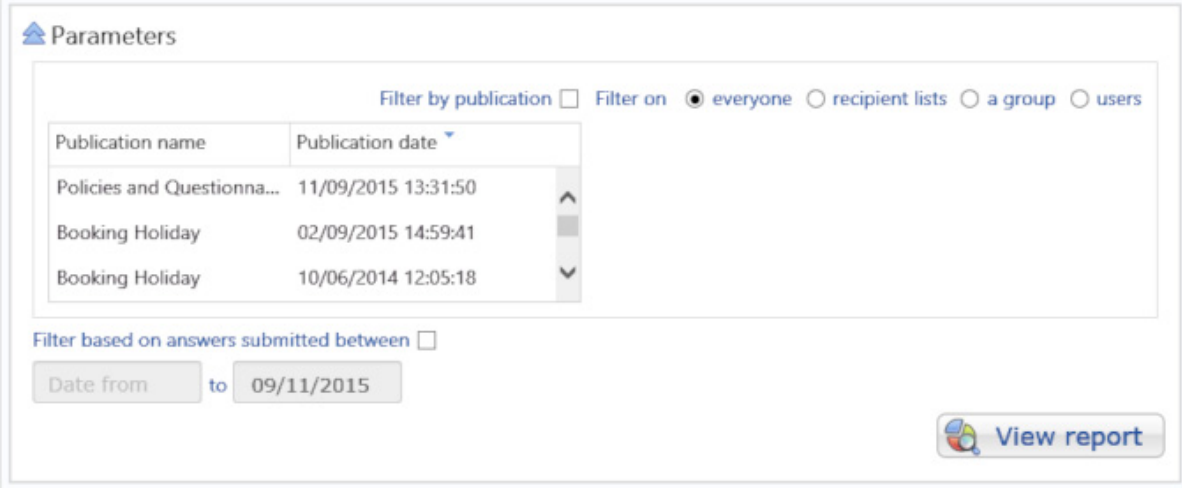
Item	Description
Status	The current status of the library item for the selected Publication for the recipient. For example: • Not Read (a Read Document has not been *Confirmed As Read*) • Document Read • Test Passed • Questionnaire Taken • Test Failed • Questionnaire Not Taken • Test not Taken
Date Actioned	The date and time the document was confirmed as read, the Questionnaire was responded to or the Test was taken. When the library item has not yet been completed, this is left blank.
Test Pass Mark	The pass mark set for this Test in this Publication. When the recipient has not yet completed the Test or the library item is not a Test, this is left blank.
Test Score	The score the recipient achieved for this Test in this Publication. When the recipient has not yet completed the Test or the library item is not a Test, this is left blank. Active Link. Click the Test Score to view the Test Results for the selected user and Test.
Test Result	The result (Pass or Fail) the recipient was awarded for this Test in this Publication. When the recipient has not yet completed the Test or the library item is not a Test, this is left blank. Active Link. Click the Test Result (Pass or Fail) to view the Test certificate for the selected user and Test.
Publication Status (Hidden by default)	Publications have the status *Completed* when: • They have been complied with by all recipients. • The rule used for Publication has expired. • They were Published directly into user library. Publications are *Active* when there are still some outstanding publications to be complied with and the rule has not expired. Publications have the status *Error* when they weren't sent because of an error. Publications have the status *Retracted* when the Publication was *Retracted*. Publications have the status *Recalled* when the Publication was *Recalled*.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click *Close* to return to the *Library Item Audit By Publication* report.

14.2.10.7. View Standout Answers Report For All Recipients Of This Publication

In the Summary Report's *Parameters* section (when available), you can filter by Publication, Date (from when the Questionnaire was sent), Everyone, Recipient Lists, Group and User.



Additionally, you can select the *Filter based on answers submitted between* tick box and enter the *From* and *To* dates, as required.

This report shows a graph of the number of replies belonging to each Standout Answer Group.

The column headings in the above report are described in Table 56.

TABLE 56. Standout Answers Report

Item	Description
Standout Answer Group	The name of the Standout Answer Group. Active Link. Click on a Standout Answer Group name to display the Standout Answers By Groups report for the selected Standout Answer Group. See "Standout Answers By Group Report" on page 370 for more information.
Submission Count	The number of times an answer belonging to the Standout Answer Group was given.
Last Submitted	The date and time an answer belonging to the Standout Answer Group was submitted.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click *Close* to return to the Publications list.

Note: If no one chose the Standout Answers or if the Questionnaire did not contain any Standout Answers (or you selected a publication which did not contain a Questionnaire), you will see the message 'No report data found'.

14.3. Standard View Tab

The *Standard view* tab displays all the users who were sent the Publication.

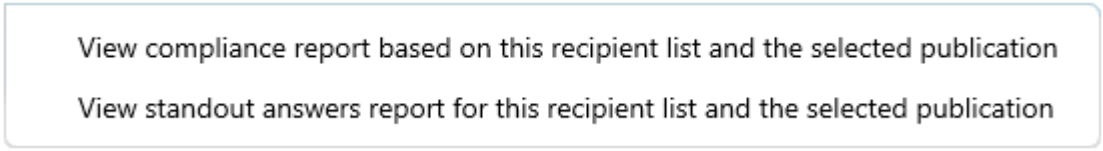
The column headings in the list are described in Table 57.

TABLE 57. Standard User Tab

Item	Description
Group name	The name of the Recipient List which was added as an *Intended Recipient* to the selected Publication.
Group description	The description given to the Recipient List.
Group rule	The rule used to send the selected Publication to the user. Click the icon to display the rule details.
Priority	The Priority which was given to the Recipient List in the selected Publication.

You can also view reports on specific Recipient Lists which were sent the selected Publication. Click on the *Standard view* tab, right-click on a Recipient List and select *Reporting*.

The following menu is displayed:



When selected, each menu item will generate a report.

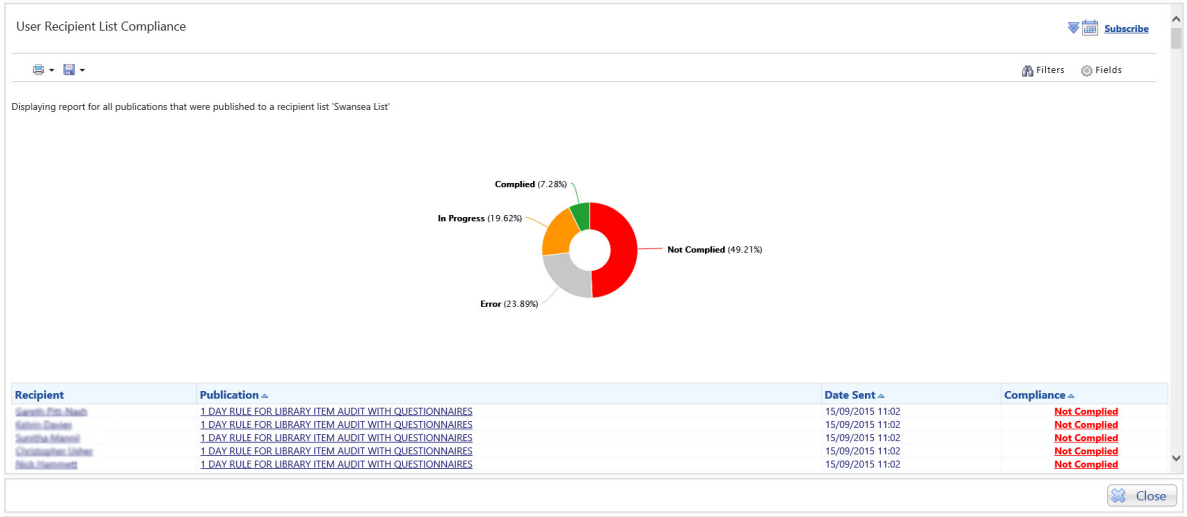
To investigate in more detail, click on any of the active links (underlined text) in the report.

Note: A report toolbar is displayed on each report. See "Report Toolbar" on page 363 for a description of the toolbar.
Each report includes a *Filters* tab which displays or hides filters which can be used to refine the report. For more information about adding and or changing filtering options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372 and "Changing the Default Filtering Option" on page 373.
Each report also has the capability to sort data within each column. For more information See "Sorting Report Data Within Columns" on page 376.
The reports also include a *Fields* tab which displays or hides fields which can also be used to refine the report. For more information see "Adding/Removing Columns From Reports" on page 376. Large reports contain a tool bar to navigate between report pages. For more information See "Report Pagination" on page 377.
The *Subscribe* button enables the User to create a report subscription. For more information see "Creating Subscriptions" on page 380.

14.3.1. View Compliance Report Based On This Recipient List And The Selected Publication

This report displays a chart for the selected Publication and Recipient List.

This chart shows the percentage of recipients in each Compliance State (*Complied*, *In Progress*, *Not Complied* or in *Error*).



The column headings in the above report are in Table 58.

TABLE 58. User Recipient List Compliance Report

Item	Description
Recipient	The name of a User belonging to the selected Recipient List. Active Link. Click on a user name to display the *User Compliance* report for the selected user. See "User Compliance Report" on page 326 for more information.
Publication	The name of the Publication sent to the Recipient. Active Link. Click on a Publication to display the *User Compliance* report for all recipients of the selected Publication. See "User Compliance Report" on page 326 for more information.
Date Sent	The date the Publication was sent.

TABLE 58. User Recipient List Compliance Report

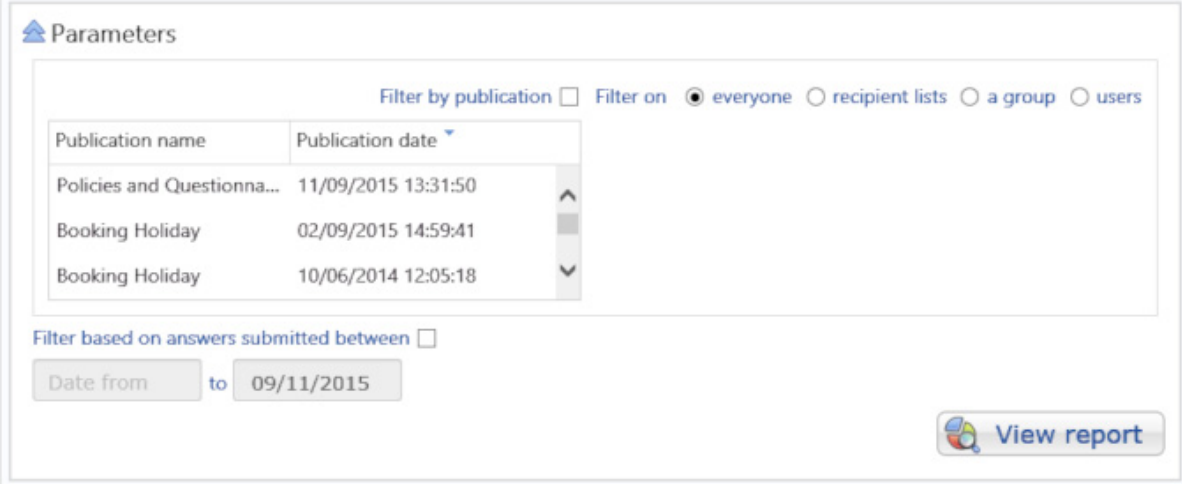
Item	Description
Compliance	The compliance state (Complied, In Progress, Not Complied or in Error) of the Publication for the Recipient. Active Link. Click on a user's Compliance Status for a Publication to display the *User Action* report for the selected Publication and the selected user. See "User Action Report" on page 270 for more information.
Publication Status (Hidden by default)	Publications have the status *Completed* when: • They have been complied with by all recipients. • The rule used for Publication has expired. • They were Published directly into user library. Publications are *Active* when there are still some outstanding publications to be complied with and the rule has not expired. Publications have the status *Error* when they weren't sent because of an error. Publications have the status *Retracted* when the Publication was *Retracted*. Publications have the status *Recalled* when the Publication was *Recalled*.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click *Close* to return to the Publications list.

14.3.2. View Standout Answers Report For This Recipient List And The Selected Publication

In the Summary Report's *Parameters* section (when available), you can filter by Publication, Date (from when the Questionnaire was sent), Everyone, Recipient Lists, Group and User.



Additionally, you can select the *Filter based on answers submitted between* tick box and enter the *From* and *To* dates, as required.

This report shows a graph of the number of replies belonging to each Standout Answer Group.

The column headings in the above report are described in Table 59.

TABLE 59. Standout Answers Report

Item	Description
Standout Answer Group	The name of the Standout Answer Group. Active Link. Click on a Standout Answer Group name to display the Standout Answers By Groups report for the selected Standout Answer Group. See "Standout Answers By Group Report" on page 370 for more information.
Submission Count	The number of times an answer belonging to the Standout Answer Group was given.
Last Submitted	The date and time an answer belonging to the Standout Answer Group was submitted.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click *Close* to return to the Publications list.

Note: If no one chose any of the Standout Answers or if the Questionnaire did not contain any Standout Answers (or you selected a publication which did not contain a Questionnaire), you will see the message 'No report data found'.

14.4. Full User Breakdown Tab

The *Full user breakdown* tab lists the users who received the selected Publication.

The column headings in the list are described in Table 60.

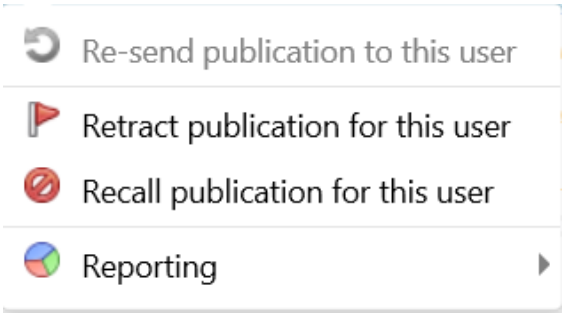
TABLE 60. Full User Breakdown Tab

Item	Description
First name	The first name of a user who was sent the selected Publication.
Surname	The last name of a user who was sent the selected Publication.

TABLE 60. Full User Breakdown Tab

Item	Description
Complied	Indicates whether the user has completed the Publication. Complied indicates the user completed the Publication within the specified time, or they completed the Publication late but the Publisher selected the option to allow them to complete the Publication after it was due. In progress indicates the user has not yet completed the Publication, but there is still time left. Error indicates the user could not complete the Publication because it was either retracted or it could not be sent due to Publication problems. Not complied indicates the user did not pass the Test(s), Read the Document(s) or complete the Questionnaire(s) in the selected Publication within the allotted time.
Rule	The rule used to send the selected Publication to the user. Click the information icon to display the rule details.

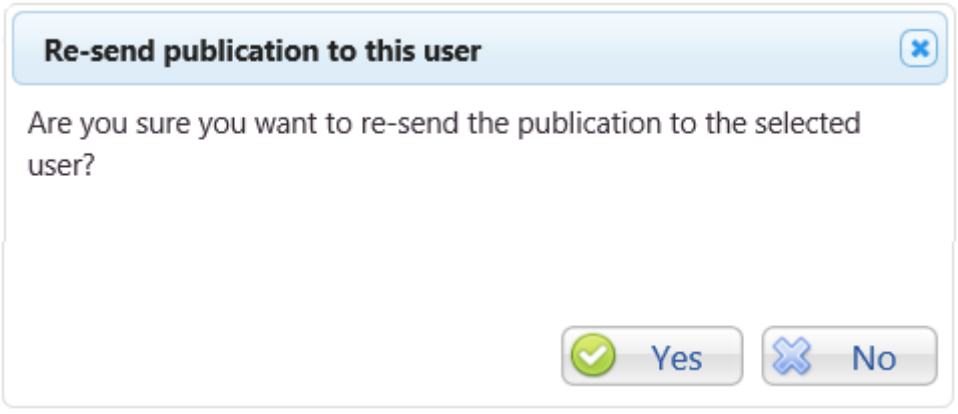
Right-click on a user to display the *Full user breakdown* menu.



14.4.1. Re-send Publication To This User

When a user has not successfully completed a Publication in the allotted time, their Complied status is set to *Error* or *Not complied* (see "Complied" in Table 60 above) and the option *Re-send publication to this user* is made available.

Select this option to re-send the selected Publication to the selected user.



Click *Yes* to re-send the Publication to the selected user, or *No* to close the dialog without re-sending the Publication.

14.4.2. Retract Publication For This User

The *Retract publication for this use*r option allows you to retract a Publication from the Inbox of one or more recipients. To retract a document from all recipients see “Retract Document” on page 108. To retract a document revision from all recipients see “Retract Revision” on page 137.

See “Retract Publication For A Single User” on page 267 or “Retract Publication For Several Users” on page 267 for details.

14.4.2.1. Retract Publication For A Single User

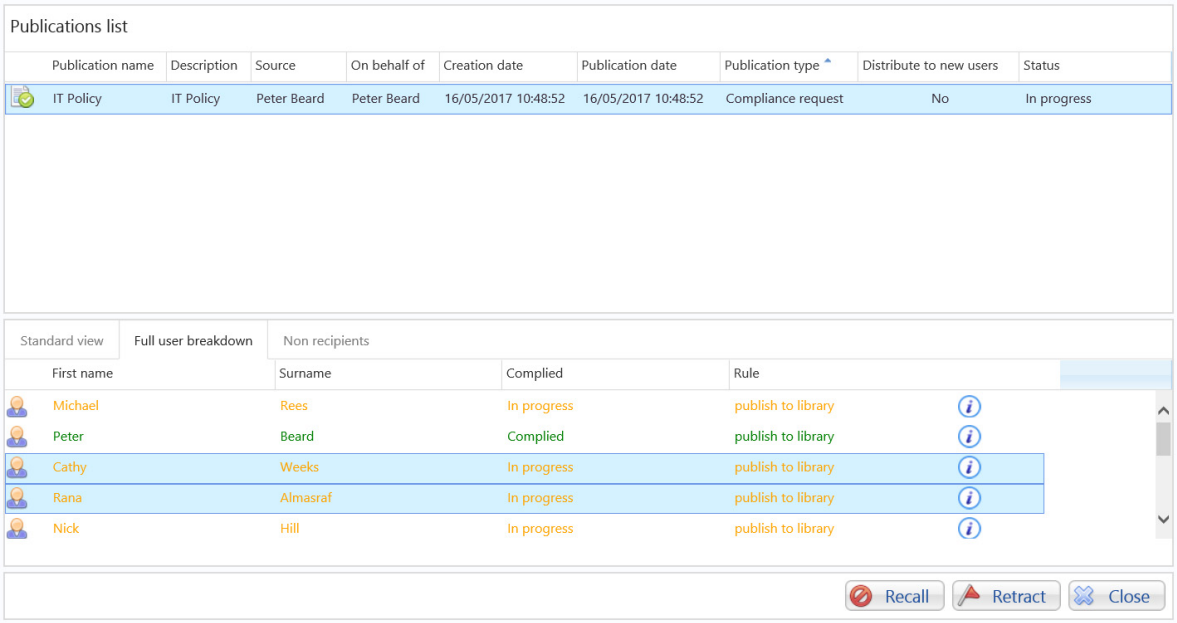
From the *Publication list* pane, select the *Full user breakdown* tab. Right click on the recipient you wish to retract the Publication from and select *Retract publication for this user* from the menu.

A dialog is displayed. Enter the reason for retracting the Publication in the dialog. This reason will be displayed on the *Retracted Documents* page. Click *Yes* to retract the Publication from the selected user, or *No* to close the dialog without re-retracting the Publication.

If the retraction is for a remaining user, a dialog is displayed stating: *This publication has already been retracted from all other users. Would you like to retract the publication instead?* Selecting *Yes* will retract the publication with a *Retracted* status in the Publication list. The result is the same as “Retract Document” Selecting *No* will return you to the *Retract publication for this user* dialog.

14.4.2.2. Retract Publication For Several Users

From the *Publication list* pane, select the *Full user breakdown* tab. To retract a Publication from more than one recipients, click on the first user, hold down the keyboard’s Ctrl key, and then click on each additional user, as required.



Click the *Retract* button at the bottom of the *Publication list* pane. A dialog is displayed.

Enter the reason for retracting the Publication in the dialog. This reason will be displayed on the *Retracted Documents* page. Click *Yes* to withdraw the Publication from the selected users, or *No* to cancel the retraction.

If the retraction is for the remaining users, a dialog is displayed stating: *This publication has already been retracted from all other users. Would you like to retract the publication instead?* Selecting *Yes* will retract the publication with a *Retracted* status in the Publication list. The result is the same as "Retract Document" Selecting *No* will return you to the *Retract publication for these users* dialog.

14.4.3. Recall Publication For This User

The *Recall publication for this use*r option allows you to retract a Publication from the Inbox of one or more recipients. To retract a document from all recipients see "Recall Document" on page 108. To retract a document revision from all recipients see "Recall Revision" on page 137.

See "Recall Publication For A Single User" on page 268 or "Recall Publication For Several Users" on page 269 for details.

14.4.3.1. Recall Publication For A Single User

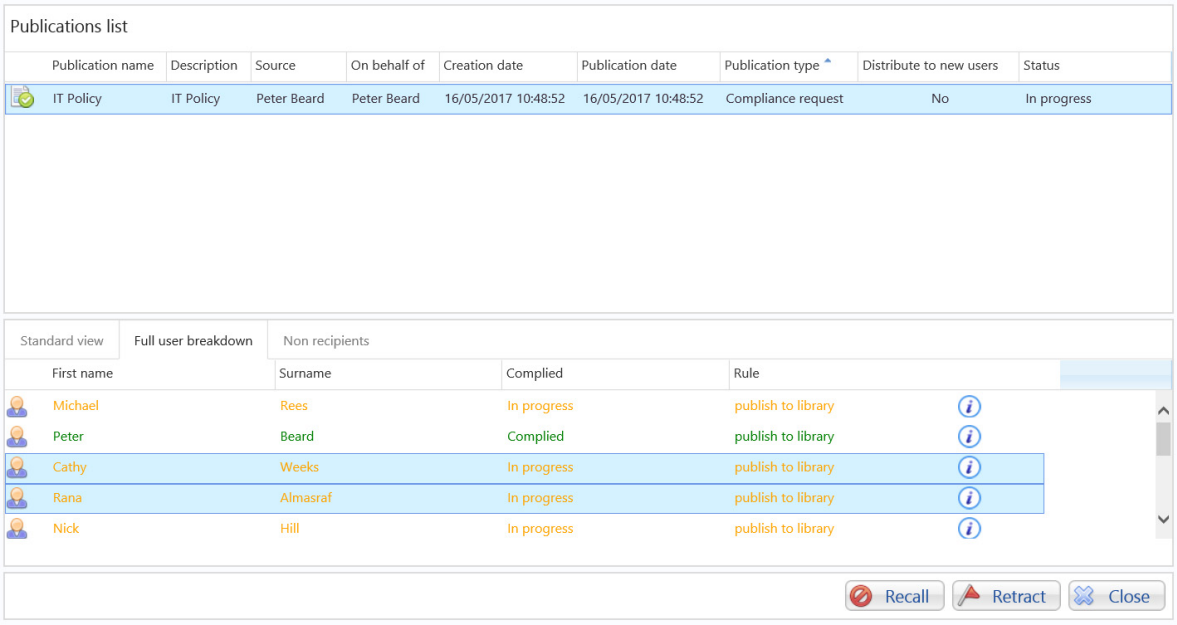
From the *Publication list* pane, select the *Full user breakdown* tab. Right click on the recipient you wish to recall the Publication from and select *Recall publication for this user* from the menu.

A dialog is displayed. Enter the reason for recalling the Publication in the dialog. This reason will be displayed on the *Recalled Documents* page. Click *Yes* to recall the Publication from the selected user, or *No* to close the dialog without recalling the Publication.

If the recall is for a remaining user, a dialog is displayed stating: *This publication has already been recalled from all other users. Would you like to recall the publication instead?* Selecting *Yes* will recall the publication with a *Recalled* status in the Publication list. The result is the same as "Recall Document" Selecting *No* will return you to the *Recall publication for this user* dialog.

14.4.3.2. Recall Publication For Several Users

From the *Publication list* pane, select the *Full user breakdown* tab. To recall a Publication from more than one recipients, click on the first user, hold down the keyboard's Ctrl key, and then click on each additional user, as required.



Click the *Recall* button at the bottom of the *Publication list* pane. A dialog is displayed.

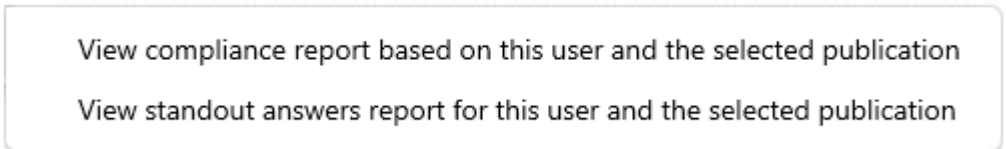
Enter the reason for recalling the Publication in the dialog. This reason will be displayed on the *Recalled Documents* page. Click *Yes* to recall the Publication from the selected users, or *No* to cancel the recall.

If the recall is for the remaining users, a dialog is displayed stating: *This publication has already been recalled from all other users. Would you like to recall the publication instead?* Selecting *Yes* will recall the publication with a *Recalled* status in the Publication list. The result is the same as "Recall Document". Selecting *No* will return you to the *Recall publication for these users* dialog.

14.4.4. Reporting

Click on the *Full User Breakdown* tab, right-click on a User and select *Reporting*.

The following menu is displayed:



When selected, each menu item will generate a report.

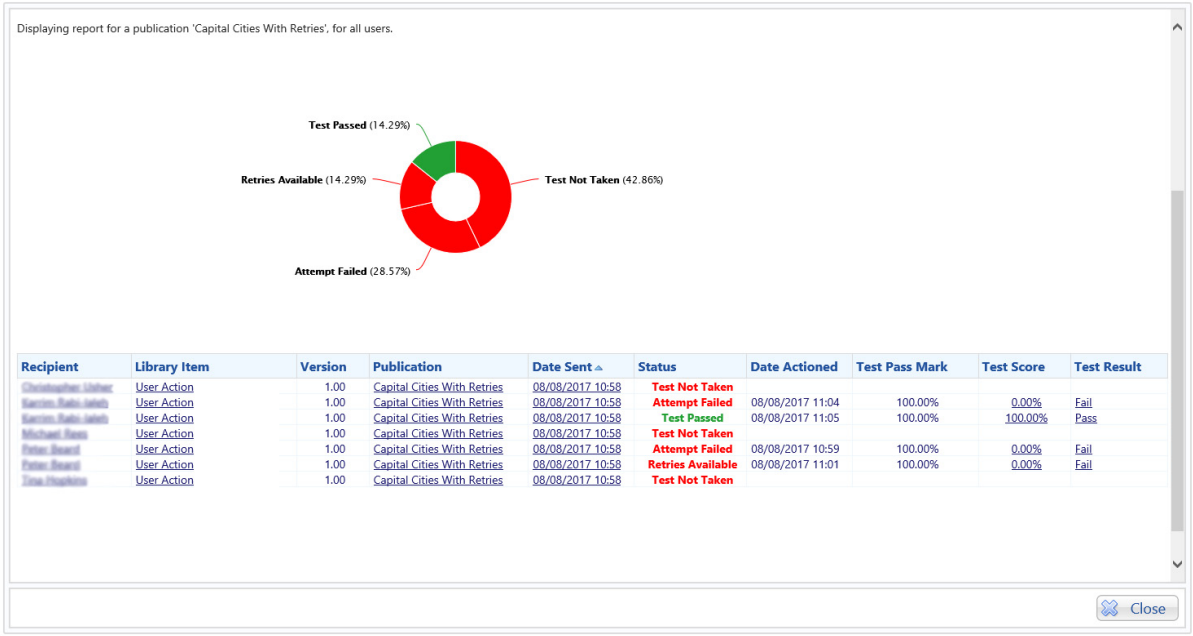
To investigate in more detail, click on any of the active links (underlined text) in the report.

Note: A report toolbar is displayed on each report. See "Report Toolbar" on page 363 for a description of the toolbar.
Each report includes a *Filters* tab which displays or hides filters which can be used to refine the

report. For more information about adding and or changing filtering options, see “Date Filters” on page 371, “Additional Filtering Options” on page 372 and “Changing the Default Filtering Option” on page 373.
Each report also has the capability to sort data within each column. For more information See “Sorting Report Data Within Columns” on page 376.
The reports also include a *Fields* tab which displays or hides fields which can also be used to refine the report. For more information see “Adding/Removing Columns From Reports” on page 376. Large reports contain a tool bar to navigate between report pages. For more information See “Report Pagination” on page 377.
The *Subscribe* button enables the User to create a report subscription. For more information see “Creating Subscriptions” on page 380.

14.4.4.1. View Compliance Report Based On This User And The Selected Publication

This report lists all the Users who have the selected Compliance Status for the selected Publication.



The column headings in the above report are described in Table 61.

TABLE 61. User Action Report

Item	Description
Recipient	The name of a User with the selected Compliance Status for the selected Publication. Active Link. Click a *User Name* to see the same User Action report for the selected user only.
Library Item	The name of the selected Library Item which belongs to the Publication. Active Link. Click to see the *User Action* report for the selected document and all Compliance States.
Version	The version of the Library Item which was included in the Publication.

TABLE 61. User Action Report

Item	Description
Publication	The name of the Publication used to send the version of Library Item. Active Link. Click a Publication to see the Publication Compliance report for the selected Publication. See "Publication Compliance Report" on page 367 for more information.
Date Sent	The date the Publication was sent. Active Link. Click on a date to display the *Publication Compliance* report for the Publication sent at the selected time. See "Publication Compliance Report" on page 367 for more information.
Status	The current status of the library item in the selected Publication. For example: • Not Completed (a Read Document has not been *Confirmed As Read*) • Document Read • Test Not Taken • Attempt Failed (a Test with multiple retries and the first attempt was not successful) • Retries Available (a Test with multiple retries and the second or subsequent attempt was not successful up to the penultimate retry) • Test Passed • Test Failed • Questionnaire Not Taken • Questionnaire Taken
Date Actioned	The date the Document was read, the Test was taken or the Questionnaire was taken. If the item is still to be completed or was not completed in time, the *Action Date* is left blank.
Test Pass Mark	The Test Pass Mark is displayed for *Tests*. The Test Pass Mark is left blank for *Documents* and *Questionnaires*. The Test Pass Mark is also left blank for T*ests which have yet to be completed*.
Test Score	The percentage awarded to the user for the selected Test. The *Test Score* is left blank for Documents and Questionnaires. The *Test Score* is also left blank for Tests which have yet to be completed.

TABLE 61. User Action Report

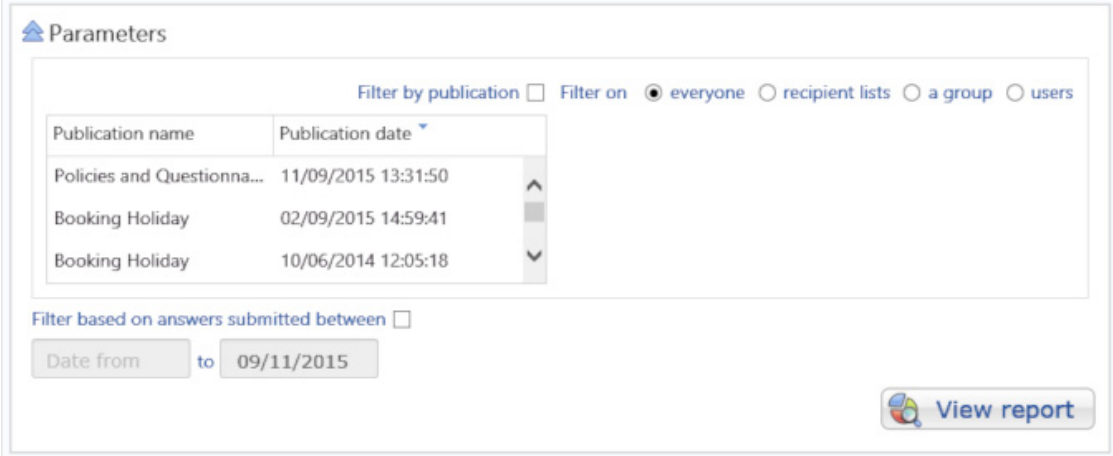
Item	Description
Test Result	*Pass* – the user passed the Test. *Fail* – the user failed the Test. The *Test Result* is left blank for Documents and Questionnaires. The *Test Result* is also left blank for Tests which have yet to be completed.
Compliance (Hidden by default)	The compliance state (Complied, In Progress, Not Complied or in Error) of the Publication for the Recipient.
Publication Status (Hidden by default)	Publications have the status *Completed* when: • They have been complied with by all recipients. • The rule used for Publication has expired. • They were Published directly into user library. Publications are *Active* when there are still some outstanding publications to be complied with and the rule has not expired. Publications have the status *Error* when they weren't sent because of an error. Publications have the status *Retracted* when the Publication was *Retracted*. Publications have the status *Recalled* when the Publication was *Recalled*.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click *Close* to return to the *Publications List*.

14.4.4.2. View Standout Answers Report For This User And The Selected Publication

In the Standout Answers Report's *Parameters* section (when available), you can filter by Publication, Date (from when the Questionnaire was sent), Everyone, Recipient Lists, Group and Users.



Additionally, you can select the *Filter based on answers submitted between* tick box and enter the *From* and *To* dates, as required.

This report shows a graph of the number of replies belonging to each Standout Answer Group.

The column headings in the above report are described in Table 62.

TABLE 62. Standout Answers Report

Item	Description
Standout Answer Group	The name of the Standout Answer Group. Active Link. Click on a Standout Answer Group name to display the Standout Answers By Groups report for the selected Standout Answer Group. See "Standout Answers By Group Report" on page 370 for more information.
Submission Count	The number of times an answer belonging to the Standout Answer Group was given.
Last Submitted	The date and time an answer belonging to the Standout Answer Group was submitted.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click *Close* to return to the *Publications List*.

Note: If the User did not select a Standout Answer or if the Questionnaire did not contain any Standout Answers (or you selected a publication which did not contain a Questionnaire), you will see the message 'No report data found'.

14.5. Non Recipients Tab

The *Non recipients* tab displays all the PolicyHub users who were *not* sent the selected Publication.

The column headings in the list are described in Table 63.

TABLE 63. Non Recipients Tab

Item	Description
First name	The given name of a user who was *not* sent the selected Publication.
Surname	The family name of a user who was *not* sent the selected Publication.

14.6. Close Button

Click the *Close* button to close the *Publications List* page. The Publications List page is closed and you are returned to the Document, Test or Questionnaire in the PolicyHub *Library*.

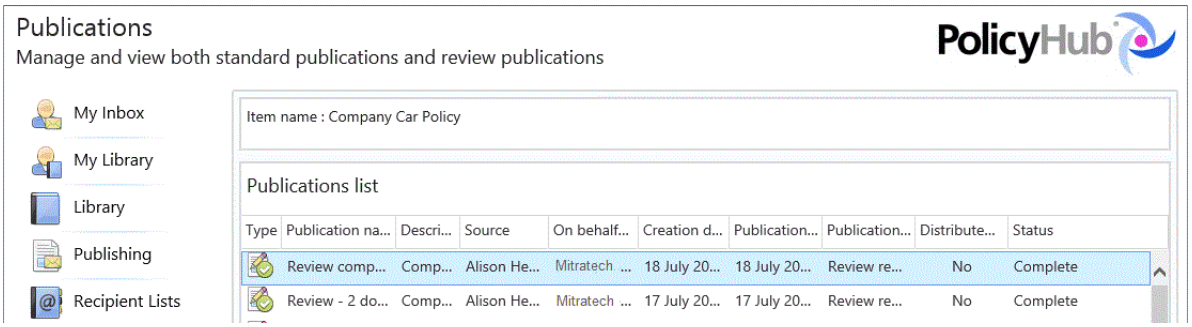
The Publications List page is displayed when a Document, Test or Questionnaire is selected in the library and the menu option *Publish document* or *Send for review* is selected. When the Document, Test or Questionnaire is Published or sent for Review, the *Publications List* page is displayed, showing the Publication or Review just created.

The Publications List page is also displayed when you select a Document, Test or Questionnaire in the library, right-click on it and then select the menu option *View publications containing this... document/test/questionnaire*.

15. Reviews

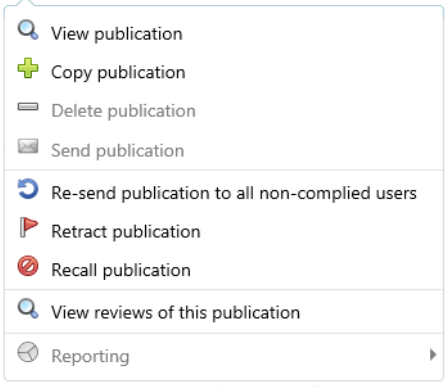
When review documents are returned with comments or changes, the Publisher can *Accept* or *Reject* changes to Word documents and read comments returned with any type of document.

To see the comments and changes returned by the document reviewers, in the library, select the document which was sent for review, right-click on it, and, from the menu, select *View publications containing this document*. This option lists all the Publications which have been created which include the selected document. Select the required Publication whose *Publication type* is *Review request*.



15.1. Publication Menu

Right-click on the Review Publication to display the following menu.



15.2. View Reviews Of This Publication

Select *View reviews of this publication* to open the *View Document Reviews* page.

Note: Depending on your PolicyHub licence, *View feedback for this publication* may appear in the menu instead of *View reviews of this publication*.

Note: This option is *not* available for Review Publications which have the status *Still to be Published*.

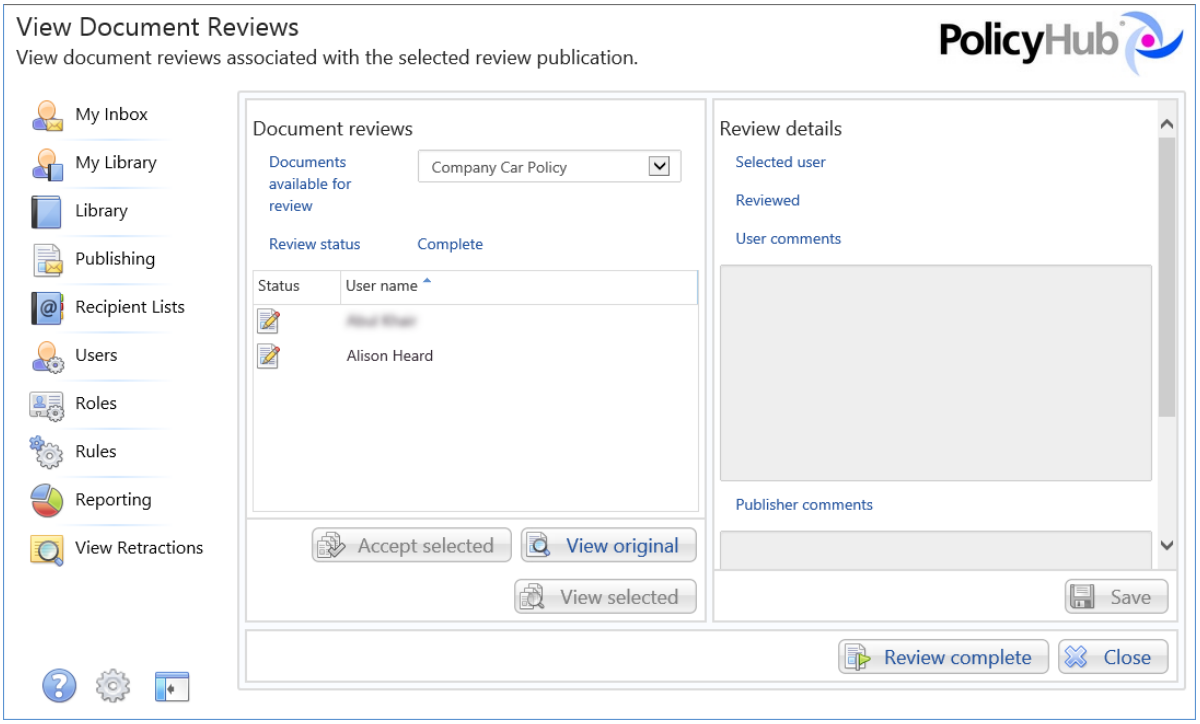


Table 64 describes the items shown on the *View Document Reviews* page.

TABLE 64. View Document Reviews

Item	Description
Documents available for review	Each document which was sent in the selected Publication can be selected by clicking on the drop-down list beside
Review status	When the document's *Review status* is: *Pending conversion* – the selected review document has not yet been sent to the reviewers as they are being converted to the appropriate format before being sent. *In progress* – the selected review document has been sent to the reviewers but not all the reviewers have completed the review. *Complete* – the selected review document has been reviewed by all reviewers.
Status	– the reviewer has not yet reviewed and submitted the document. See *User has not reviewed the document,* below. – the reviewer has returned the document without any changes or comments. – the reviewer has returned the document with changes or comments.

TABLE 64. View Document Reviews

Item	Description
User name	The name of each of the recipients of the document(s) sent for review.
Selected user	The name of the reviewer whose *User name* is selected.
Reviewed	Indicates whether the User has reviewed the document and, if they have, whether they returned any comments and/or modifications. *User has not reviewed the document* – the reviewer has not yet reviewed and submitted the document. *User has accepted the document* – the reviewer has returned the document without any changes or comments. *User has modified the document* – the reviewer has returned the document with changes or comments. Reviewers can make changes to Microsoft Word documents but not to any other type of document (such as PDF). Reviewers may return comments for all types of document.
User comments	Displays the comments the User added to the comments box after reviewing the document. If the reviewer made no changes and left no comments, the text *Document accepted without modifications* is displayed.
Publisher comments	The User who is viewing the document review can add comments to the *Publisher comments* text box. Publisher comments can be added for Users who have completed the review of the selected document only. Enter the comments in the *Publisher comments* text box and click *Save* to save these comments.
Save	Save the Publisher comments.
Review complete	Changes the Review status to *Complete*.
Close	Close the *View Document Reviews* page and return to the *Publications* page.

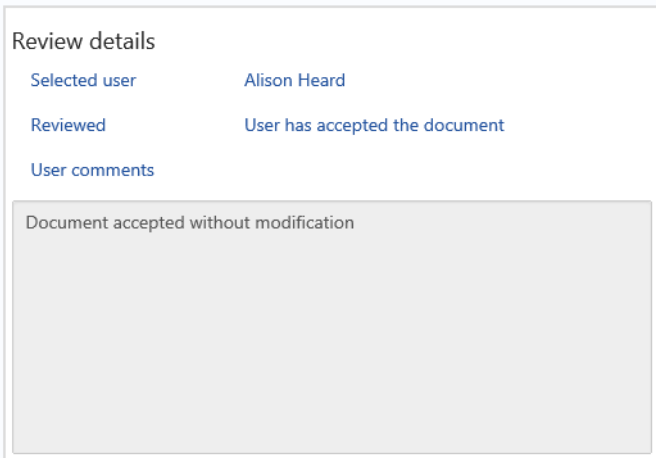
15.2.1. Viewing Review Comments

Once changes and/or comments have been returned, the Publisher can read the comments returned by the reviewer.

When multiple documents were sent for review in a single Publication, use the drop-down list beside *Documents available for review* to select the document you want to investigate.

To view the comments returned by a User, select the *User name* from the list on the left. The comments are displayed in the *User comments* box on the right. When the review document is not a Word document, the reviewer cannot make changes to the review document. Any changes the reviewer suggests must be entered as comments. The Publisher should then read the comments returned by each reviewer and decide which of the comments to implement.

When a User accepts a Word document with no changes, or returns any other type of document without any comments, *Document accepted without modification* is displayed in the *User comments* box.



The Publisher can add comments in the *Publisher comments* box. Click *Save* to save the entered text.

15.2.2. Viewing Changes Made To A Review Word Document

15.2.2.1. Accept Selected

When a Word document has been reviewed by more than one reviewer, the Publisher can accept all the changes in all the selected documents without accepting each change individually. A new revision of the document is then added to the library containing all the changes in the selected documents.

Note: This button is available when two or more reviewers (who have completed the review) are selected only.

15.2.2.2. View Original

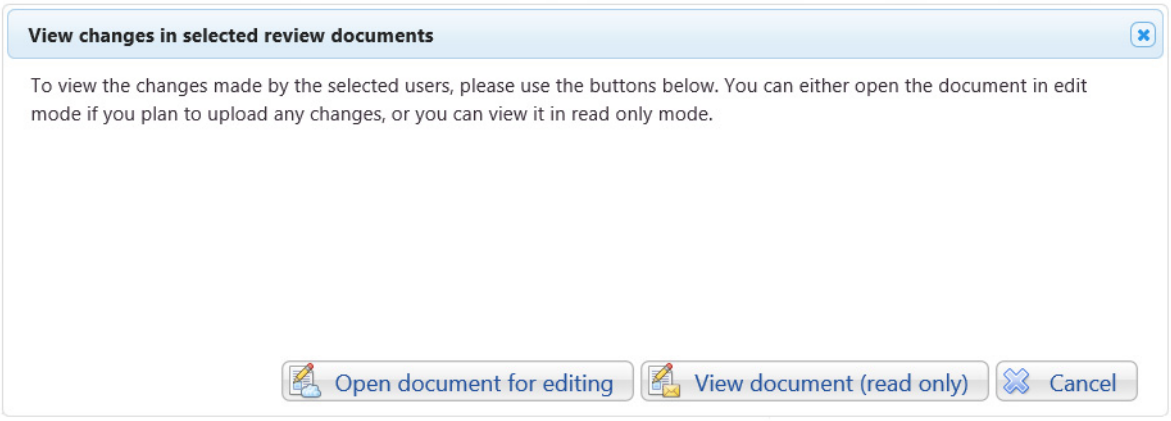
Click *View original* to view the original document which was sent for review.

15.2.2.3. View Selected

When a Word document has been reviewed, the Publisher can decide which changes to accept and which changes to reject.

Select one or more reviewers who have completed the review and click *View selected.* The changes made to the documents by all the selected reviewers are merged in to one Word

document. When *View Selected* is clicked, the *View changes in selected review documents* dialog is displayed.



The buttons shown are described below.

15.2.2.4. Open Document For Editing

When the Publisher clicks *Open document for editing*, the document which contains all the changes from the selected User(s) is opened in Word. The Publisher can then view each change and *Accept* or *Reject* it. The Publisher can then save the document and close Word. The *View changes in selected review documents* dialog now offers the following options.

Publish revision – the newly saved revision is uploaded and included in the list of *Items to be published* on the *Build New Publication* page. You can then complete the options and Publish the new revision.

Send for review – the newly saved revision is uploaded and included in the list of *Items to be reviewed* on the *Build New Review Publication*. You can then complete the options and send the new revision for review.

Save as new revision – the newly saved revision is uploaded and is added as a new revision of the original document to the PolicyHub library.

Cancel – the newly saved revision is discarded and you are returned to the *View Document Reviews* page.

15.2.2.5. View Document (Read Only)

When the Publisher clicks *View document (read only)*, the document which contains all the changes from the selected Users is downloaded and opened in Word. The Publisher can then

view each change. However, any edits the User makes are not uploaded to PolicyHub. When Word is closed, the User is returned to the *View changes in selected review document* dialog. From here they can Open Document For Editing, View Document (Read Only) or Cancel.

15.2.2.6. Cancel

Click *Cancel* to close the dialog and return to the *View Document Reviews* page.

15.2.3. Viewing Changes Made To A Review Document (Not Word)

When non-Word documents are reviewed, the reviewers return all their changes as comments see "Viewing Review Comments" on page 278).

Note: Reviewers cannot make changes to a review document if the document is not a Word document.

15.2.3.1. Accept Selected

The *Accept selected* button is not available for reviews of Documents which are not Word documents.

15.2.3.2. View Original

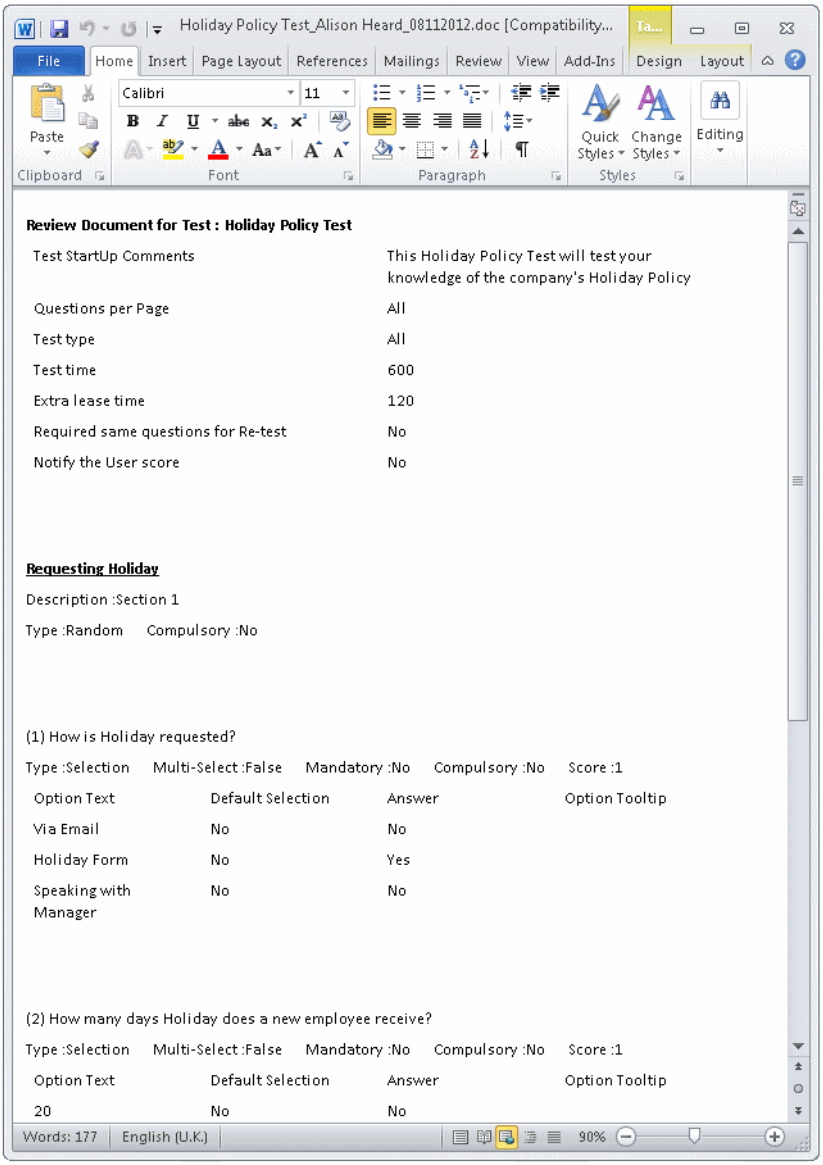
Click *View original* to view the original document which was sent for review.

15.2.3.3. View Selected

The *View selected* button is not available for reviews of Documents which are not Word documents.

15.2.4. Viewing Changes Made To A Review Test Or Questionnaire

When a Test or Questionnaire is sent for review, it is first converted to a Word document.



Reviewers can make comments in the Word documents and these comments can be viewed by the Publisher. The *Accept selected* button is not available for review Tests and Questionnaires because the edits made to the Word document cannot be converted to changes to the original Test or Questionnaire.

The items included in a Review Test Word document are described in Table 65.

TABLE 65. Review Test: Terminology

Term	Meaning / Description
Review Document for Test	The *Test name* given to the Test.
Test Startup Comments	The *Start-up comments* given to the Test.
Questions per Page	The value assigned to *Questions per page* for the Test.
Test time	The amount of time in seconds given to the recipient to complete the Test. The *Test time* is shown to the user.
Extra lease time	The amount of extra time in seconds given to the user. This extra time is not disclosed to the user.

TABLE 65. Review Test: Terminology

Term	Meaning / Description
Required same questions for Re-test	When the option Use same questions for re-test is selected, this is Yes. When the option is cleared this is No.
Notify the User score	When the option Display test score is selected, this is Yes. When the option is cleared, this is No.

The remainder of the Review Test includes the configured sections and the questions in each section.

The items included in a Review Questionnaire Word document are described in Table 66.

TABLE 66. Review Questionnaire: Terminology

Term	Meaning / Description
Review Document for Questionnaire	The *Questionnaire name* given to the Questionnaire.
Questionnaire Startup Comments	The *Start-up comments* given to the Questionnaire.
Questions per Page	The value assigned to *Questions per page* for the Questionnaire.

The remainder of the Review Questionnaire includes the configured sections and the questions in each section.

15.2.4.1. View Original

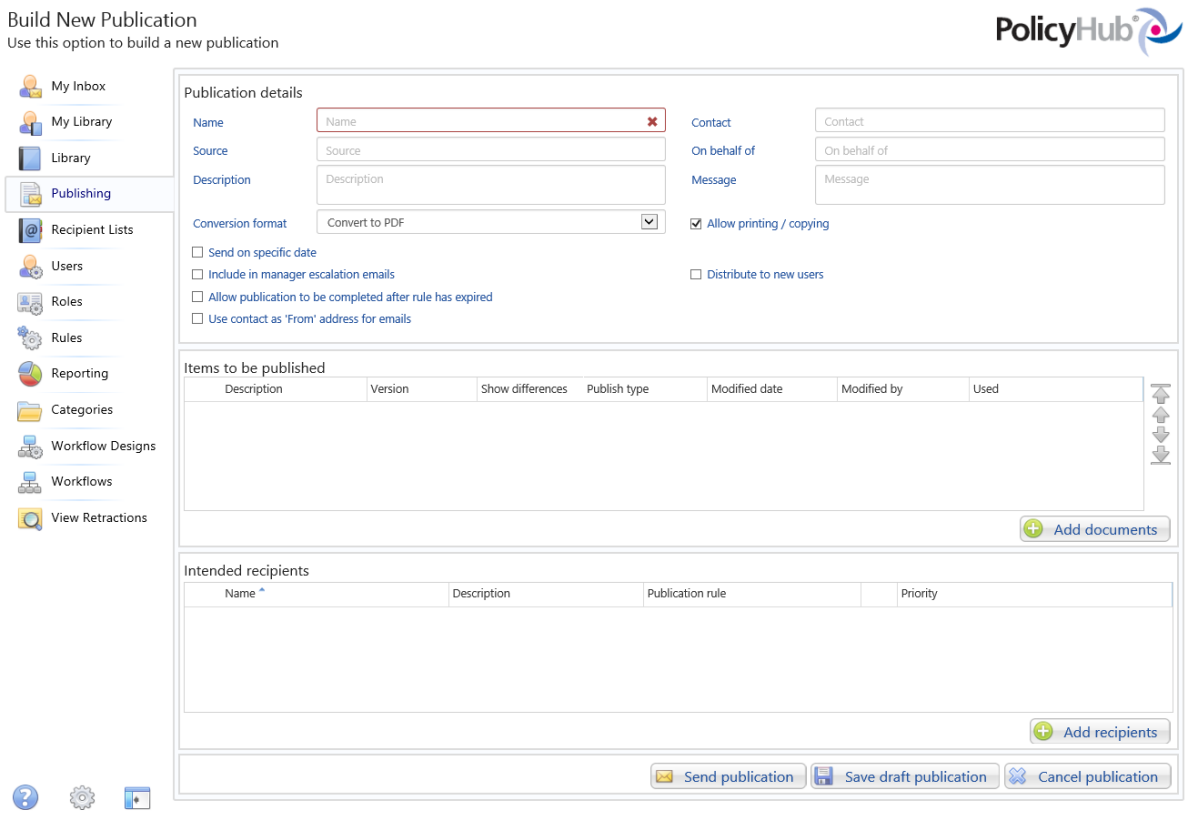
Click *View original* to view the original version of the Test or Questionnaire after it was converted to a Word document.

15.2.4.2. View Selected

Select one or more reviewers who have completed the review and click *View selected.* The changes made to the review documents by all the selected reviewers are merged in to one Word document. The merged document is opened in Word for viewing. each change can be viewed in the Word document. When you have finished viewing the changes, close the Word document.

16. Publishing

The Publishing page is used to distribute Policies, Tests and Questionnaires to Users.



Note: It is not possible to distribute a Compliance Publication containing a template.

16.1. Publication And Review Details

The options available in the *Publication* and *Review details* pane are described in Table 67

.

TABLE 67. Publication And Review Details

Item	Description
Publication type	Select the Publication type: *Review* – when a Document, Test or Questionnaire is being developed, it can be sent for *review* to a panel of reviewers. The Publisher can then determine which of the suggested changes to incorporate in to a new revision of the Document, Test or Questionnaire. *Compliance* – the recipients are required to Confirm a Document as Read, pass a Test or respond to a Questionnaire.
Name	Enter a name for the Publication. This name is displayed in the recipient's Inbox. **Note:** A Publication must have a name.
Source	Enter the source of the Publication. When only one item (Document, Test or Questionnaire) is in the Publication, this information is populated automatically using the library item's *Source* information. When multiple items (Documents, Tests or Questionnaires) are in the Publication, and all the items have the same *Source* information, this information is populated automatically using the library items' *Source* information. When multiple items (Documents, Tests or Questionnaires) are in the Publication, and the items do not have the same *Source* information, this information must be entered. **Note:** A Publication must have a source.
Description	Enter a description of the Publication. The description is displayed when the User clicks the Publication's icon.
Conversion format	From the *Conversion format* drop-down list, select either to *Use source form*at as the document's distribution format or to *Convert to PDF*. This option applies to Office Documents only.

TABLE 67. Publication And Review Details

Item	Description
Contact	Enter the name or the email address of the person the recipients should get in touch with should they have any questions. **Note:** When a Review Publication is created with the option *Send status updates to this address* selected, the *Contact* must be a valid email address (not a name). See "Send status updates to this address" on page 289 for more information. **Note:** A Publication must have a contact.
On behalf of	Enter the name of the person or department the Publication is being sent on behalf of.
Message	Enter a message to be included in the email notification when the Publication is sent. (This *Message* is ignored if the rule used has *Send notification message* set to *No*.)
Allow printing/copying	In a Compliance Publication, if you select *Convert to PDF* as the Conversion format, you can choose to allow the recipients to print the document by selecting the *Allow printing/copying* tick box. (By default, *Allow printing/copying* is selected.) **Note:** If the *Allow printing/copying* tick box is deselected it will not prevent a user from saving the Publication.
Send on specific date	When cleared, the Publication is sent when the *Publish items* button is clicked (assuming the PolicyHub service is running and there are no errors on the *Build New Publication* page). When *Send on specific date* is selected, you can configure a date and time when the Publication will be sent. Click in the *Send on* text box and select a date from the pop-up calendar. To set the time the Publication will be sent, use the slider controls next to Hour and Minute to change the time. Alternatively, you can change the time by clicking in the *Send on* text box again and entering the required time. **Note:** If you select *Send on specific date*, you cannot *Save draft publication*.

TABLE 67. Publication And Review Details

Item	Description
Resolve users	In a Compliance Publication, when you select *Send on specific date*, you can select when Users are resolved (i.e. when recipients are checked and validated). *At publication time – Users*, *Recipient Lists* and *Groups* are resolved at the time the Publication is sent. Any Users who are on the distribution list but are in the *Disabled* state at the time of Publication will not receive the Publication. *Immediate – Users*, *Recipient Lists* and *Groups* are resolved at the time the *Publish items* button is clicked. Any Users who are on the distribution list but are in the *Disabled* state at the time the *Publish items* button is clicked will not receive the Publication. *Immediate, except groups – Users* and *Recipient Lists* are resolved at the time the *Publish items* button is clicked. Any *Users* or *Recipient List* members who are on the distribution list but are in the *Disabled* state at the time the *Publish items* button is clicked will not receive the Publication. *Groups* are resolved at the time the Publication is sent. Any *Group* members who are on the distribution list but are in the *Disabled* state at the time of Publication will not receive the Publication.
Include in manager escalation emails	When cleared, a manager escalation email will not be sent for this Publication. When selected, a manager escalation email will be sent for this Publication. For more information see "Include in Escalation Emails" on page 244. **Note:** Depending on your PolicyHub licence, this option may not be available in your application software.

TABLE 67. Publication And Review Details

Item	Description
Allow publication to be completed after rule has expired	Rules are used to define the amount of time a User is allowed to complete the items in a Publication. When a User does not complete the items in the Publication in the allotted time, they are marked as non-complied. However, the option *Allow publication to be completed after rule has expired* can be used to allow the recipients to complete the items in the Compliance Publication after the completion deadline has passed. When they successfully complete the items in the Compliance Publication after the deadline has passed, they are logged as *Compliant but late*. Select *Allow publication to be completed after rule has expired* to allow the recipients to complete the Compliance Publication after the deadline has expired. Clear *Allow publication to be completed after rule has expired* to ensure the recipients can complete the items in the Compliance Publication before the deadline expires. **Note:** When a *Login Intercept* rule is selected (see "Intended Recipients" on page 293), *Allow publication to be completed after rule has expired* is automatically selected. This is done to prevent a non-complied User from being locked out of their Windows session. The *Allow publication to be completed after rule has expired* option is used with Compliance Publications only – it is *not* available for Review Publications.
Distribute to new users	Select the option *Distribute to new users* to ensure Users added to a Group (or Users moved from one Group to another) receive the document. The Publication is sent to the members of the *Recipient List*. As new Users are added to the *Group* (contained within the *Recipient List*), they will also be sent the Publication (until this option is turned off). See "Distribute To New Users" on page 56 for some examples. **Note:** The *Distribute to new users* option is used with *Groups* only. If the *Recipient List* does not contain any *Groups*, this option has no effect. The *Distribute to new users* option is available for Compliance Publications only – it is *not* available for Review Publications.

TABLE 67. Publication And Review Details

Item	Description
Use contact as 'From' address for emails	Select this tick box to use your contact email address as the From address on the email notification. If this tick box is cleared, the default setting is used. This is only used when the Publication rule has *Send notification message* set to *Yes*.
Send status updates to this address	When this option is selected, the Reviewer will be sent an email when each user: Accepts the document without any changes, Accepts the document with comments or Submits changes to the document. **Note:** When this option is selected, the *Contact* must be a valid email address (not a name). See "Contact" on page 286 above, for more information. **Note:** This option is available for Review Publications only.
Pass mark for any included tests	Enter a value between 0 and 100. This is the percentage of correct answers the recipient has to achieve to pass the Test. **Note:** This option is available only when a Test has been added to the *Items to be published*.
Questionnaire submission type	Select *Not anonymous*, *Optionally anonymous* or *Anonymous* as required. See "About Anonymous Questionnaires" on page 424, for more detailed information about anonymous *Questionnaires*. **Note:** This option is available only when a Questionnaire has been added to the *Items to be published*.

16.2. Items To Be Published

Documents, Templates, Questionnaires and Tests can be added to (or removed from) the list of items to be Published. The columns displayed in the *Items to be published* pane are described in Table 68.

TABLE 68. Items To Be Published

Item	Description
Icon	The icon indicates the type of Office Document being Published or that the Test or Questionnaire has been validated or has not been validated. **Note:** A Text or a Questionnaire which has *not be validated* (the icon includes a cross on a red circle) cannot be Published. Save the Publication as a draft and correct the errors in the Test or Questionnaire. You can then edit the draft Publication and send it.
Description	The description given to this revision of the Read Document, Reference Document, Test, Questionnaire or Review Document/Test/Questionnaire.
Version	The version number of the document being Published or sent for Review.
Show differences	For Reference, or Read documents either *No*, *Optional* or *Yes* is displayed. For Review documents either *No* or *Optional* is displayed. See "Show Differences" on page 291 for more information on changing this setting.
Publish type	The *Publish type* can be selected and changed for some documents. See "Change The Publish Type" on page 291 for more information on changing this setting.
Modified date	The date this revision of the document, Test or Questionnaire was created.
Modified by	The name of the User who created this revision of the Document, Test or Questionnaire.
Used	The number of times this revision of the document has previously been published. (The total number of Compliance and Review Publications used to Publish it.)

Note: Multiple Documents can be sent in a Compliance or a Review Publication. Reference documents can also be added to a Publication. (Reference documents do not need to be Confirmed as Read or commented on as part of a Review.) In a Compliance Publication, a Read Document can be sent with a Test or with a Questionnaire, but a Test and a Questionnaire cannot be sent together. In a Review Publication, neither a Test nor a Questionnaire can be sent with any other items.

Although you are allowed to save a draft Publication with all these documents, you will not be allowed to *send* the Publication until any errors have been resolved.

16.2.1. Show Differences

The Read Documents, Review Documents\Tests\Questionnaires and Reference Documents listed in the Publication have a *Show Differences* setting. *Show Differences* can be selected and changed for these document types.

- *No* – the differences between the current version of the document and the previous version sent to you are not shown to the recipients.
- *Optional* – the differences between the current version of the document and the previous version sent to you are shown optionally – the recipient can decide whether or not to show the differences by clicking the *View document differences* icon to show the differences:

- and clicking the *Return to original document* icon to view the document without the changes highlighted.

Note: For Review Documents, differences are always displayed in a PDF document. For Review Tests and Review Questionnaires, differences are always displayed in a Word document.
For a Read Document sent as a Word document, the differences are displayed in a Word document. For a Read Document sent as a PDF document, the differences are displayed in a PDF document.

- *Yes* – the differences between the current version of the document and the previous version sent to each recipient are always shown to the recipients.

Note: *Show differences* can be set to *Yes, No* or *Optional* for Compliance Publication items. However, Review documents have the options *No* or *Optional* only.
For a Read Document sent as a Word document, the differences are displayed in a Word document. For a Read Document sent as a PDF document, the differences are displayed in a PDF document.

16.2.2. Change The Publish Type

The documents which are listed in the Publication have a *Publish type*. The *Publish type* can be selected and changed for some documents.

When a *Publication type* is changed from *Compliance* to *Review*, or from *Review* to *Compliance*, the *Publish type* is changed automatically, as appropriate.

16.2.2.1. Review

- *Review Questionnaire* – the *Publish type* cannot be changed.
- *Review Test* – the *Publish type* cannot be changed.
- *Review Template* (via Workflows) – The *Publish type* cannot be changed.
- *Review Document* – the *Publish type* can be changed to *Reference only*. A *Reference document* cannot be commented on but provides extra information to help the Reviewer.
- *Reference Only* – the *Publish type* can be changed to *Review document*. *A Review document* requires the Reviewer to either accept it *without* any comments, or to accept it *with* comments.

16.2.2.2. Compliance

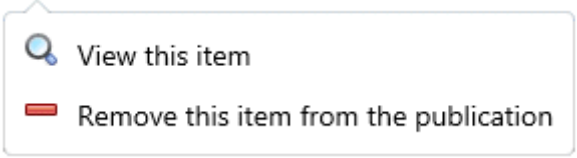
- *Take Questionnaire* – the *Publish type* cannot be changed.
- *Take Test* – the *Publish type* cannot be changed.
- *Read Document* – the *Publish type* can be changed to *Reference only.* A *Reference document* cannot be *Confirmed as Read* but it provides extra information to help the User.
- *Reference Only* – the *Publish type* can be changed to *Read document*. A Read document must be *Confirmed as Read*.

16.2.3. Add Documents Button

Click to add Documents, Templates, Tests or Questionnaires to the Publication. Select the folder which contains the Documents, Templates, Tests or Questionnaires you want to Publish. Multiple items can be selected from the same folder by holding down the *Ctrl* key while you click on all the required items. Consecutive items can be selected by holding down the *Shift* key and clicking on the first item in the list and the last item in the list. Click the *Select* button.

16.2.4. Items To Be Published Menu

Right-click on an item in the *Items to be published* list or the *Items to be reviewed* list to display the menu.



16.2.4.1. View This Item

Opens the selected item in the appropriate application.

Note: A Questionnaire or Test which is sent for review is converted to Word before it is sent. However, this menu option will open the actual Test or Questionnaire in read-only mode.

16.2.4.2. Remove This Item From The Publication

Removes the selected item from the list of *Items to be published* or the list of *Items to be reviewed*.

16.2.5. Changing The Document Order

The arrows can be used to change the order documents are presented in the recipient's Inbox. This is used to highlight, for example, that a Reference Document is associated with the Read Document above it in the list.

– moves the selected document to the top of the document list.

– moves the selected document up one position in the list.

– moves the selected document down one position in the list.

– moves the selected document to the bottom of the document list.

Note: A Test cannot appear higher in the list than a Read Document, Reference Document or Questionnaire.

16.3. Intended Recipients

This pane lists the Recipient Lists which have been added to the Publication. The items displayed in the *Intended recipients* pane are described in Table 69.

TABLE 69. Intended Recipients

Item	Description
Name	The name of the Recipient List. For an unnamed Recipient List, ' - ' is displayed instead of a name.
Description	The description given to the Recipient List. For an unnamed Recipient List, 'Created by *user* on *date and time*' is displayed.
Publication rule	The name of the Publication rule which has been selected for the Recipient List.
Priority	The priority assigned to the selected Recipient List.

16.3.1. Add Recipients Button

Click the *Add recipients* button to open the list of Recipient Lists. Select the required Recipient Lists from those displayed.

The members of a Recipient List are displayed in the *Selected list members* pane, below the *Recipient lists* pane. When a Recipient List contains Groups and Recipient Lists, the active Users belonging to the Recipient List can be seen by selecting the *View contents of this*

recipient list option from the *Intended recipients* menu (see "View Contents Of This Recipient List" on page 294). The *Download to CSV* button is active when there are items in the *Selected list members* pane. Click the button to export the contents of the *Selected list members* pane to a CSV file.

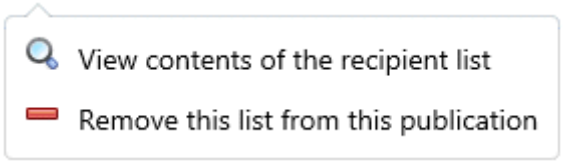
To create a new named, or unnamed, Recipient List, click on the *Groups* tab or the *Unassigned users* tab and select the Users you want to add to the Recipient List. Click *Add to list* to create a new list containing the selected Users, or click *Create new list* to create a new, empty, Recipient List. See "Creating A Recipient List While Creating A Publication" on page 63 for an example showing how to create a new Recipient List while creating a Publication.

Note: When you have selected Users, the *Select* button is disabled. This is because Users cannot be added directly to a Publication. The *Select* button is enabled only when a Recipient List is selected on the *Recipient Lists* tab.

Click *Select* to select the Recipient List. Alternatively, right-click on the required Recipient List and select *Select* from the menu. You are returned to the *Build New Publication* page with the selected Recipient List added to the *Intended Recipients* pane.

16.3.2. Intended Recipients Menu

Right-click on a Recipient List from the *Intended recipients* list to display the Intended recipients menu.



16.3.2.1. View Contents Of This Recipient List

Select this option to display all the members of the selected Recipient List.

Click *Close* to close the *Selected list members* window and return to the *Build New Publication* page.

16.3.2.2. Remove This List From This Publication

Select this option to remove the selected Recipient List from the list of Intended Recipients.

16.4. Buttons

The buttons at the bottom of the page enable the User to send a Publication, save a draft Publication or cancel the current Publication.

16.4.1. Send Publication/Send For Review

The appropriate button is displayed depending on whether Compliance or Review is selected for the Publication type.

Click this button to send the current Publication. If *Send on specific date* was selected, the Publication will be sent at the scheduled time.

The *Publications* page is displayed showing all the Publications which include the item which was at the top of the list of *Items to be published* when the Publication was sent.

Note: The *Send publication* and *Send for review* buttons can be clicked at any time. When mandatory fields are incomplete, the border turns red. These fields must be completed before the Publication or Review can be sent.

In addition, a dialog is displayed showing what information is missing and preventing the Publication from being sent.

16.4.2. Save Draft Publication/Save Review

The appropriate button is displayed depending on whether Compliance or Review is selected for the Publication type.

Click this button to save the current Publication as a draft. It can be edited later and sent when it is complete.

Note: The *Save draft publication* and *Save review* buttons can be clicked at any time. When mandatory fields are incomplete, the border turns red. These fields must be completed before the Publication or Review can be saved.

In addition, a dialog is displayed showing what information is missing and preventing the Publication from being saved.

When *Send on specific date* is selected, this button is not available.

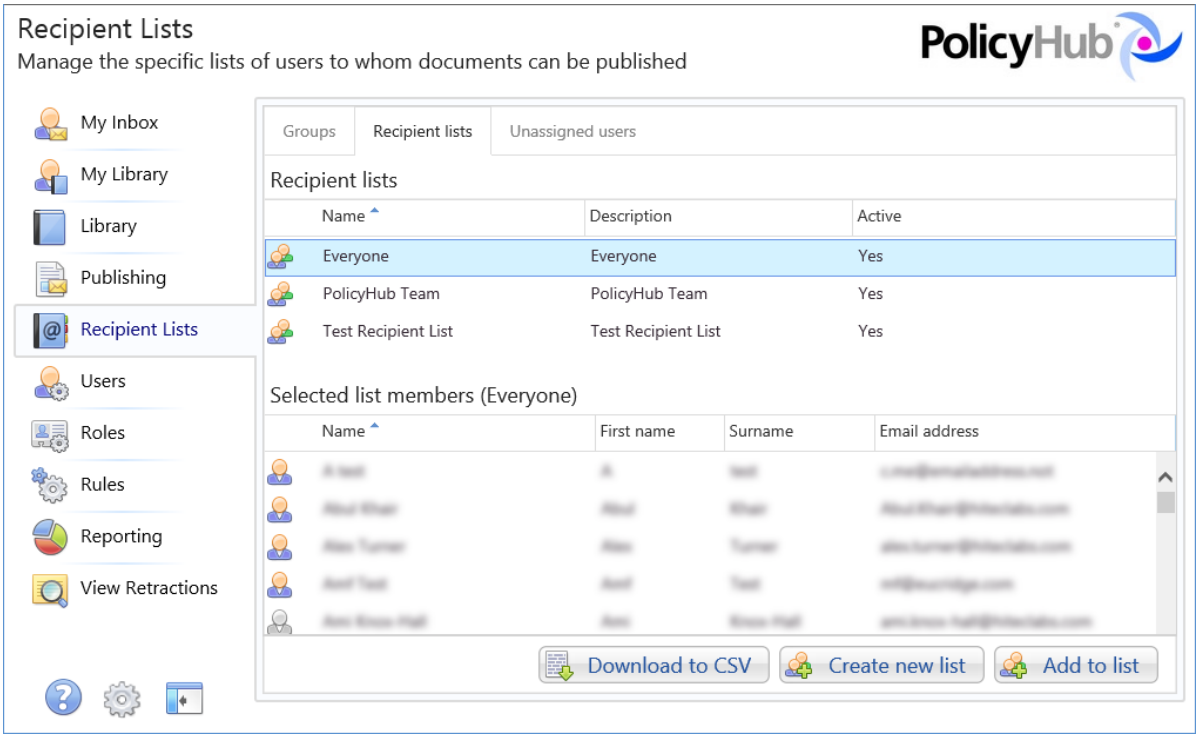
16.4.3. Cancel Publication/Cancel Review

The appropriate button is displayed depending on whether Compliance or Review is selected for the Publication type.

Click this button to close the *Build New Publication* page without saving any of the changes. The Publication is not sent or saved as a draft.

17. Recipient Lists

Recipient Lists are used to store individual Users and Groups in a named list. This enables you to easily select the Users you want to receive a Publication without having to select all the Users individually.



17.1. Recipient Lists Tab

The top half of the page shows the names of the Recipient Lists. When a Recipient List is selected in the top half of the page, the members of the selected list are displayed in the lower half of the page.

The *Selected list members* can be sorted by Name, First name, Surname and Email address. Click on a column header to sort the list by that column. Click the column header again to reverse the sort order.

The icons indicate the type of member.

– Group

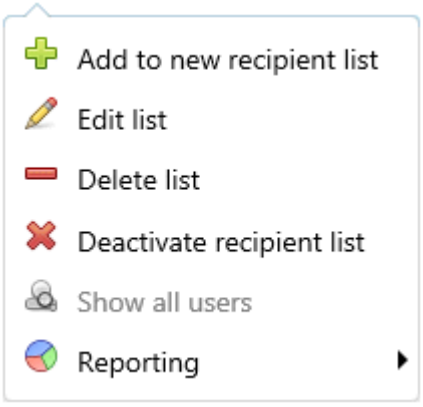
– Inactive Group

– Active User Account

– Inactive User Account

17.1.1. Recipient List Menu

To display the Recipient List menu, right-click on a Recipient List.



17.1.1.1. Add To New Recipient List

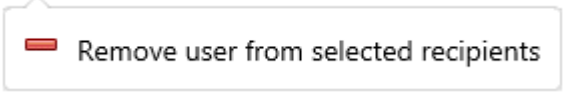
Select *Add to new recipient list* to create a new Recipient List with the selected Recipient added as a member.

17.1.1.2. Add To Recipient List

Select *Add to recipient list to* add the member to the Recipient List you are currently creating.

17.1.1.3. Edit List

Select *Edit list* from the menu to open the selected Recipient List for editing. The list is opened in the *Existing recipient list details* pane. Users, Groups and Recipient Lists can be added by dragging and dropping them from the Groups, Recipient Lists and/or Unassigned users tabs. Members who have already been added to the list can be removed by selecting the member, clicking on the black triangle on the right and selecting *Remove user from selected recipients*.



17.1.1.4. Delete List

Select *Delete list* from the menu to delete the selected Recipient List. A dialog is displayed asking you to confirm you want to delete the Recipient List. Click *Yes* to delete the Recipient List or *No* to close the dialog without deleting the Recipient List.

Note: A Recipient List *cannot* be deleted if it is associated with a document review schedule. See "Configure Review Schedule or Configure Notification" on page 122 for more information about creating a review schedule.

17.1.1.5. Activate/Deactivate Recipient List

When the selected Recipient List is already Active, the option displayed is *Deactivate recipient list*. Select *Deactivate recipient list* to make the selected Recipient List unusable.

When the selected Recipient List is not yet Active, the option displayed is *Activate recipient list*. Select *Activate recipient list* to make the selected Recipient List usable.

Note: Only *Active* Recipient Lists can be used to send Publications or can be added to newly created Recipient Lists.

17.1.1.6. Show All Users/Show Groups

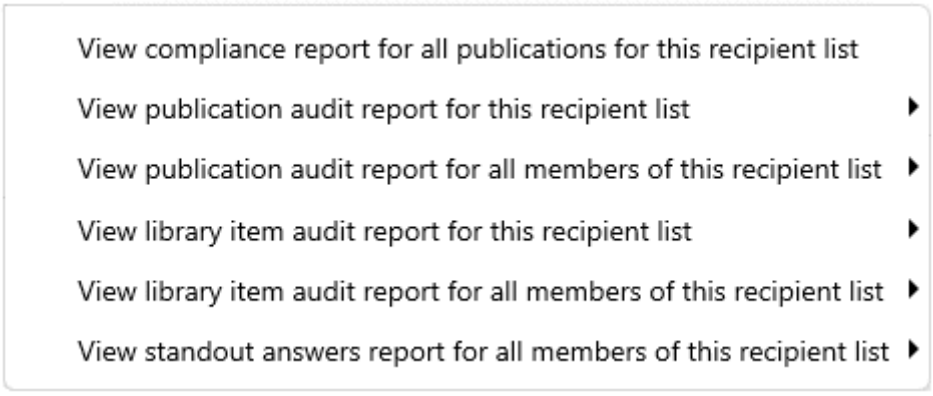
When a Recipient List contains Groups and Recipient Lists, the Users belonging to the Recipient List can be seen by selecting *Show all users*. The member Recipient Lists and Groups can be seen by selecting *Show groups.*

The Users or the member Recipient Lists and Groups (as appropriate) are shown in the *Selected list members* pane.

When *Show all users* is selected, the menu option is replaced with *Show groups*. When *Show groups* is selected, the menu option is replaced with *Show all users*.

17.1.1.7. Reporting

You can view reports based on Recipient Lists you have saved. From the main menu, select *Recipient Lists.* Select the *Recipient lists* tab, right-click on a Recipient List and select *Reporting*. The following menu is displayed.



When selected, each menu item will generate a report.

To investigate in more detail, click on any of the active links (underlined text) in the report.

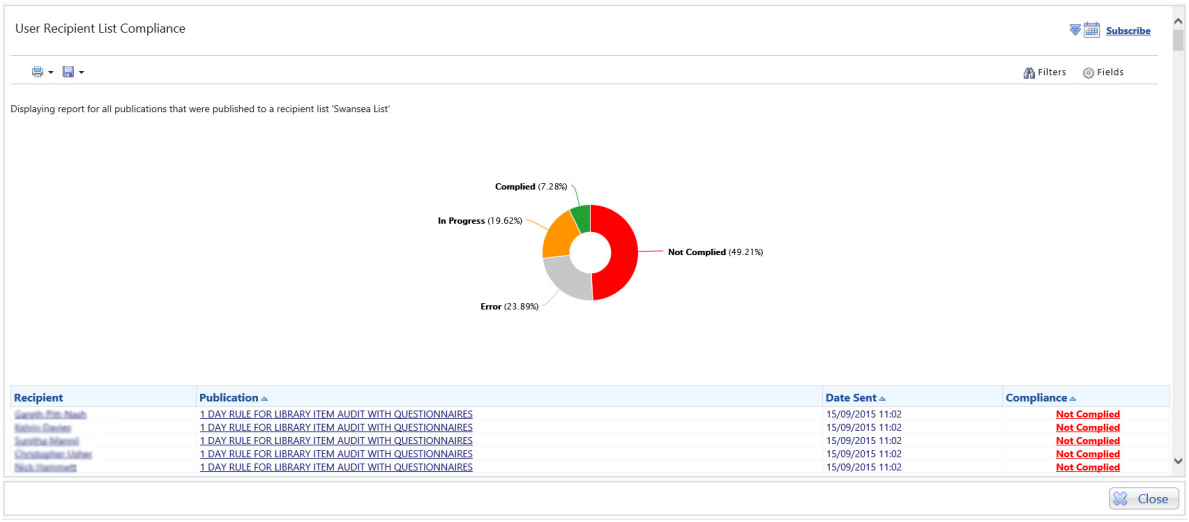
Note: A report toolbar is displayed on each report. See “Report Toolbar” on page 363 for a description of the toolbar.
Each report includes a *Filters* tab which displays or hides filters which can be used to refine the report. For more information about adding and or changing filtering options, see “Date Filters” on page 371, “Additional Filtering Options” on page 372 and “Changing the Default Filtering Option” on page 373.
Each report also has the capability to sort data within each column. For more information See

“Sorting Report Data Within Columns” on page 376.
The reports also include a *Fields* tab which displays or hides fields which can also be used to refine the report. For more information see “Adding/Removing Columns From Reports” on page 376. Large reports contain a tool bar to navigate between report pages. For more information See “Report Pagination” on page 377.
The *Subscribe* button enables the User to create a report subscription. For more information see “Creating Subscriptions” on page 380.

17.1.1.7.1. View Compliance Report For All Publications For This Recipient List

Show the report for all Publications sent to the selected Recipient List.

This chart shows the percentage of recipients in each Compliance State (*Complied*, *In Progress*, *Not Complied* or in *Error*).



The column headings in the above report are described in Table 70.

TABLE 70. User Recipient List Compliance Report

Item	Description
Recipient	The name of a User belonging to the selected Recipient List. Active Link. Click on a user name to display the *User Compliance* report for the selected user. See “User Compliance Report” on page 326 for more information.
Publication	The name of the Publication sent to the Recipient. Active Link. Click on a Publication to display the *User Compliance* report for all recipients of the selected Publication. See “User Compliance Report” on page 326 for more information.
Date Sent	The date the Publication was sent.

TABLE 70. User Recipient List Compliance Report

Item	Description
Compliance	The compliance state (Complied, In Progress, Not Complied or in Error) of the Publication for the Recipient. Active Link. Click on a user's Compliance Status for a Publication to display the *User Action* report for the selected Publication and the selected user. See "User Action Report" on page 270 for more information.
Publication Status (Hidden by default)	Publications have the status *Completed* when: • They have been complied with by all recipients. • The rule used for Publication has expired. • They were Published directly into user library. Publications are *Active* when there are still some outstanding publications to be complied with and the rule has not expired. Publications have the status *Error* when they weren't sent because of an error. Publications have the status *Retracted* when the Publication was *Retracted*. Publications have the status *Recalled* when the Publication was *Recalled*.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

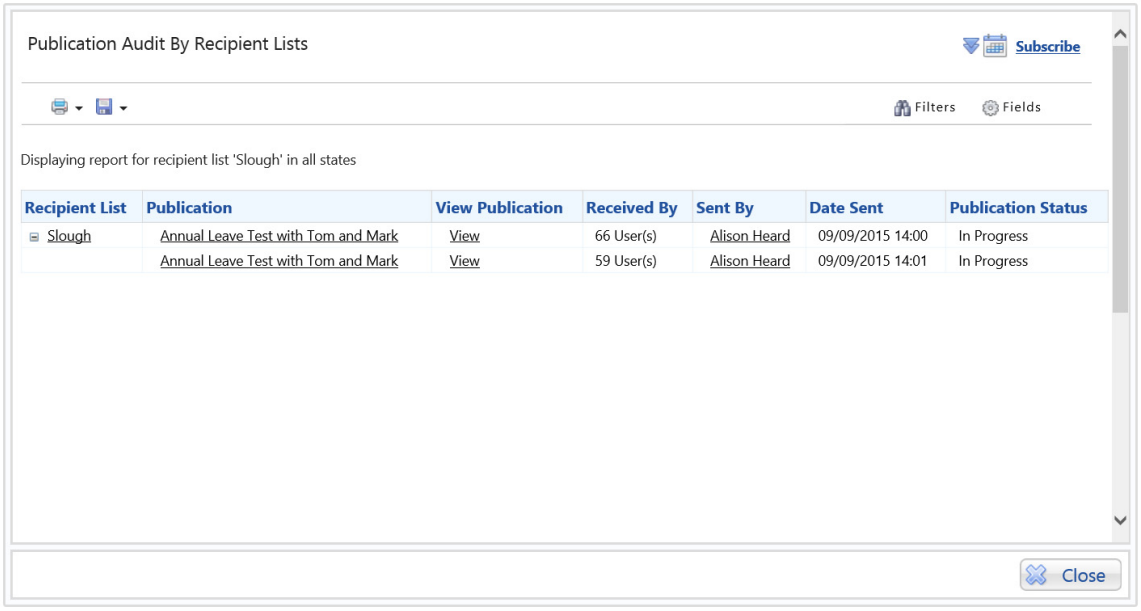
Click *Close* to return to the Recipient Lists page.

17.1.1.7.2. View Publication Audit Report For This Recipient List

From the selected menu item, select one of the following sub-menu options:

- *Across all dates* – shows the report with no date filter.
- *For a specific date range* – shows the report for Publications sent to this Recipient List on the days specified only.

This report shows the Publication Status and the number of Users who received each Publication sent to the selected Recipient List.



The column headings in the above report are described in Table 71.

TABLE 71. Recipient List Report

Item	Description
Recipient List	The name of the selected Recipient or Group List. Active Link. Click on the Recipient/Group name to open the *Recipient List Information* report. See "Recipient List Information Report" on page 254 for more information.
Publication	The names of the Publications sent to the selected Recipient List. Active Link. Click on a Publication to display the *Library Item Audit By Recipients* report for the selected Publication. See "Library Item Audit By Recipients Report" on page 306 for more information.
View Publication	Click *View* to open the *Publication Information* report for the selected Publication. See "Publication Information Report" on page 252 for information on the items displayed.
Received By	The number of recipients of the Publication.
Sent By	The name of the person who sent the Publication. Active Link. Click on a User to display the *User Information Report* for the selected user. See "User Information Report" on page 121 for more information.
Date Sent	The date the Publication was sent.

TABLE 71. Recipient List Report

Item	Description
Publication Status	Publications have the status *Completed* when: • They have been complied with by all recipients. • The rule used for Publication has expired. • They were Published directly into user library. Publications are *Active* when there are still some outstanding publications to be complied with and the rule has not expired. Publications have the status *Error* when they weren't sent because of an error. Publications have the status *Retracted* when the Publication was *Retracted*. Publications have the status *Recalled* when the Publication was *Recalled*.
Date Added (Hidden by default)	The date this version of the Document, Questionnaire or Test was created.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click *Close* to return to the Recipient Lists page.

17.1.1.7.3. View Publication Audit Report For All Members Of This Recipient List

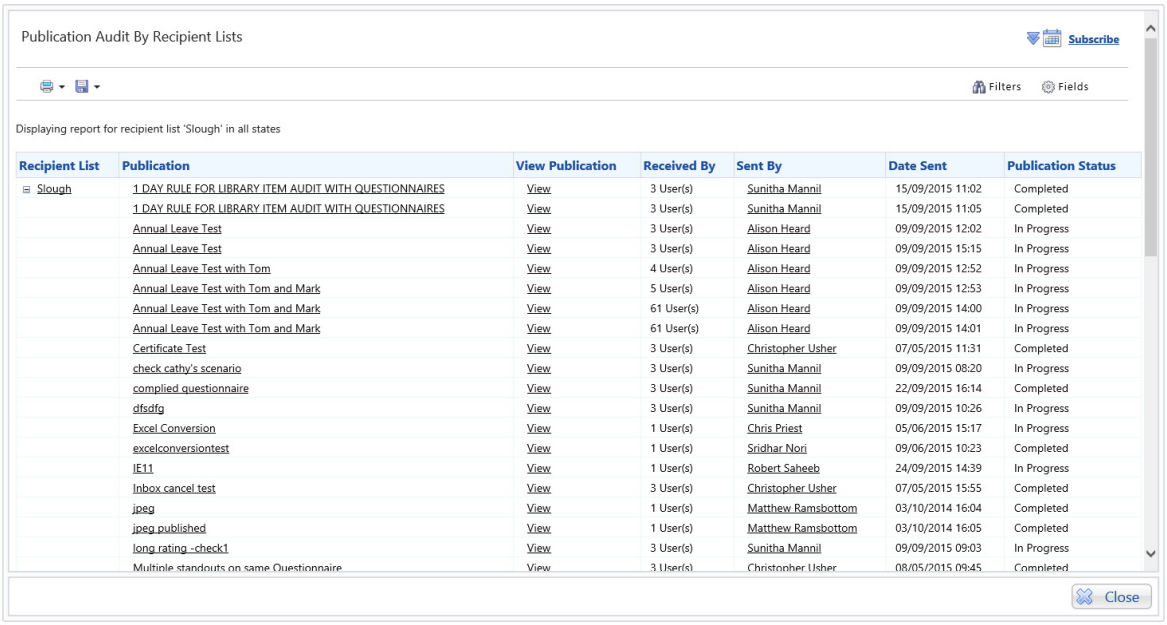
From the selected menu item, select one of the following sub-menu options:

- *Across all dates* – shows the report with no date filter.
- *For a specific date range* – shows the report for Publications sent to the members of the selected Recipient List on the days specified only.

This report shows the Publication Status and the number of Users who received each Publication sent to the members of the selected Recipient List.

This report differs from the previous report. If User John Smith belongs to the selected Recipient List, then this report includes the Publications sent to John Smith via the selected

Recipient List and also those publications sent to John Smith directly and via any different Recipient Lists to which he belongs.



Recipient List	Publication	View Publication	Received By	Sent By	Date Sent	Publication Status
Slough	1 DAY RULE FOR LIBRARY ITEM AUDIT WITH QUESTIONNAIRES	View	3 User(s)	Sunitha Mannil	15/09/2015 11:02	Completed
	1 DAY RULE FOR LIBRARY ITEM AUDIT WITH QUESTIONNAIRES	View	3 User(s)	Sunitha Mannil	15/09/2015 11:05	Completed
	Annual Leave Test	View	3 User(s)	Alison Heard	09/09/2015 12:02	In Progress
	Annual Leave Test	View	3 User(s)	Alison Heard	09/09/2015 15:15	In Progress
	Annual Leave Test with Tom	View	4 User(s)	Alison Heard	09/09/2015 12:52	In Progress
	Annual Leave Test with Tom and Mark	View	5 User(s)	Alison Heard	09/09/2015 12:53	In Progress
	Annual Leave Test with Tom and Mark	View	61 User(s)	Alison Heard	09/09/2015 14:00	In Progress
	Annual Leave Test with Tom and Mark	View	61 User(s)	Alison Heard	09/09/2015 14:01	In Progress
	Certificate Test	View	3 User(s)	Christopher Usher	07/05/2015 11:31	Completed
	check cathy's scenario	View	3 User(s)	Sunitha Mannil	09/09/2015 08:20	In Progress
	complied questionnaire	View	3 User(s)	Sunitha Mannil	22/09/2015 16:14	Completed
	dfsdfg	View	3 User(s)	Sunitha Mannil	09/09/2015 10:26	In Progress
	Excel Conversion	View	1 User(s)	Chris Priest	05/06/2015 15:17	In Progress
	excelconversiontest	View	1 User(s)	Sridhar Nori	09/06/2015 10:23	Completed
	IE11	View	1 User(s)	Robert Saheeb	24/09/2015 14:39	In Progress
	Inbox cancel test	View	3 User(s)	Christopher Usher	07/05/2015 15:55	Completed
	jpeg	View	1 User(s)	Matthew Ramsbottom	03/10/2014 16:04	Completed
	jpeg published	View	1 User(s)	Matthew Ramsbottom	03/10/2014 16:05	Completed
	long rating -check1	View	3 User(s)	Sunitha Mannil	09/09/2015 09:03	In Progress
	Multiple standouts on same Questionnaire	View	3 User(s)	Christopher Usher	08/05/2015 09:45	Completed

The column headings in the above report are described in Table 72.

TABLE 72. Publication Audit By Recipient Lists Report

Item	Description
Recipient List	The name of the selected Recipient List. Active Link. Click on the Recipient List name to open the *Recipient List Information* report. See "Recipient List Information Report" on page 253 for more information.
Publication	The names of the Publications sent to the selected Recipient List. Active Link. Click on a Publication to display the *Library Item Audit By Recipients* report for the selected Publication. See "Library Item Audit By Recipients Report" on page 306 for more information.
View Publication	Click *View* to open the *Publication Information* report for the selected Publication. See "Publication Information Report" on page 252 for information on the items displayed.
Received By	The number of recipients of the Publication.
Sent By	The name of the person who sent the Publication. Active Link. Click on a name to display the *User Information* report. See "User Information Report" on page 121 for more information.

TABLE 72. Publication Audit By Recipient Lists Report

Item	Description
Date Sent	The date the Publication was sent.
Publication Status	Publications have the status *Completed* when: • They have been complied with by all recipients. • The rule used for Publication has expired. • They were Published directly into user library. Publications are *Active* when there are still some outstanding publications to be complied with and the rule has not expired. Publications have the status *Error* when they weren't sent because of an error. Publications have the status *Retracted* when the Publication was *Retracted*. Publications have the status *Recalled* when the Publication was *Recalled*.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click *Close* to return to the Recipient Lists page.

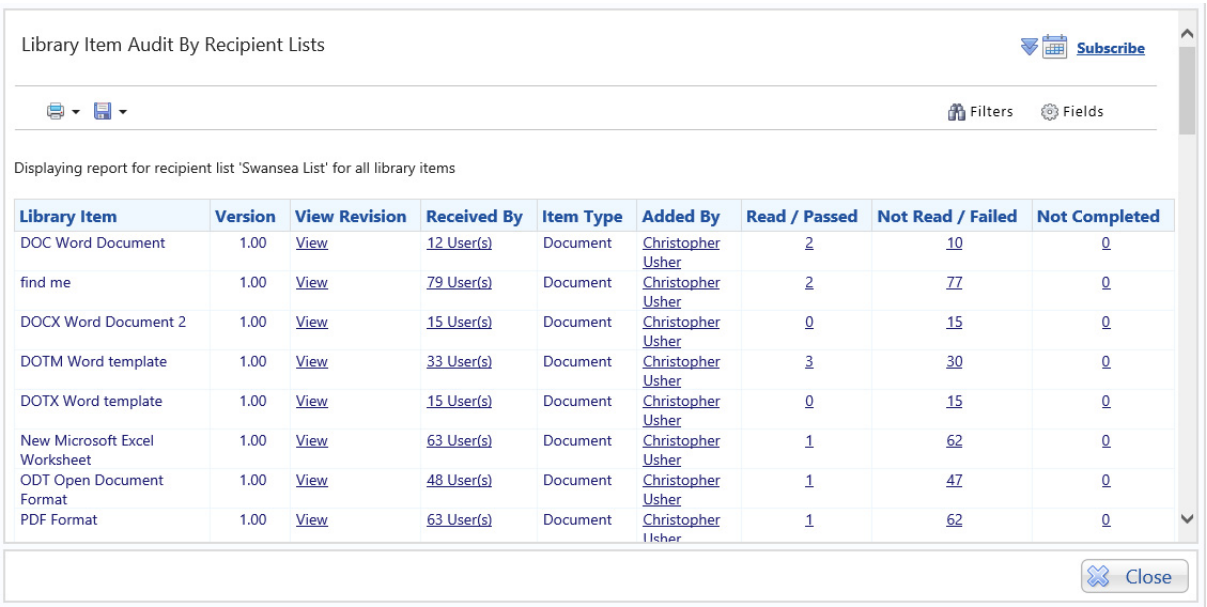
17.1.1.7.4. View Library Item Audit Report For This Recipient List

From the selected menu item, select one of the following sub-menu options:

- *Across all dates* – shows the report with no date filter.
- *For a specific date range* – shows the report for items included in Publications sent to this Recipient List on the days specified only.

This report shows all the library items sent to the selected Recipient List. For each library item displayed, the number of users who read the Document, responded to the Questionnaire or

passed the Test, or who did not read the Document, did not respond to the Questionnaire or who failed the Test is displayed.



Library Item	Version	View Revision	Received By	Item Type	Added By	Read / Passed	Not Read / Failed	Not Completed
DOC Word Document	1.00	View	12 User(s)	Document	Christopher Usher	2	10	0
find me	1.00	View	79 User(s)	Document	Christopher Usher	2	77	0
DOCX Word Document 2	1.00	View	15 User(s)	Document	Christopher Usher	0	15	0
DOTM Word template	1.00	View	33 User(s)	Document	Christopher Usher	3	30	0
DOTX Word template	1.00	View	15 User(s)	Document	Christopher Usher	0	15	0
New Microsoft Excel Worksheet	1.00	View	63 User(s)	Document	Christopher Usher	1	62	0
ODT Open Document Format	1.00	View	48 User(s)	Document	Christopher Usher	1	47	0
PDF Format	1.00	View	63 User(s)	Document	Christopher Usher	1	62	0

The column headings in the above report are described in Table 73.

TABLE 73. Library Item Audit By Recipients Report

Item	Description
Library Item	The name of a Document, Questionnaire or Test which was sent to the selected Recipient List.
Version	The version of the Document, Questionnaire or Test which was sent to the selected Recipient List.
View Revision	Active Link. Click *View* to view the selected Document revision or *Preview* to preview the selected Test or Questionnaire revision.
Received By	The number of recipients of the library item. Active Link. Click the number of users who received this library item to see the *General Library Item* report for Publications which included this library item. See “General Library Item Report” on page 257 for more information.
Item Type	Policy Documents have the Item Type *Document.* Questionnaires have the Item Type *Questionnaire*. Tests have the Item Type *Test.*
Added By	The name of the person who uploaded or edited this version of the Document, Questionnaire or Test. Active Link. Click to open the *User Information* report for the selected user. Report. See “User Information Report” on page 121 for information.

TABLE 73. Library Item Audit By Recipients Report

Item	Description
Read / Passed	The number of people who read the Document, responded to the Questionnaire, or who passed the Test. Active Link. Click to see the *General Library Item* report for the recipients who read this document, passed this Test or responded to this Questionnaire. See "General Library Item Report" on page 257 for more information.
Not Read / Failed	The number of people who did not read the Document or who did not respond to the Questionnaire or who failed the Test but the time specified by the distribution rule *has not yet expired*. Active Link. Click to see the *General Library Item* report for the recipients who have not yet read this document, not yet passed this Test or have not yet responded to this Questionnaire. See "General Library Item Report" on page 257 for more information.
Not Completed	The number of people who did not read the Document or who did not respond to the Questionnaire or who failed the Test and they have retries remaining and the time specified by the distribution rule *has expired.* Active Link. Click to see the *General Library Item* report for the recipients who did not read this document, failed this Test or did not respond to this Questionnaire. See "General Library Item Report" on page 257 for more information.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

Click *Close* to return to the Recipient Lists page.

17.1.1.7.5. View Library Item Audit Report For All Members Of This Recipient List

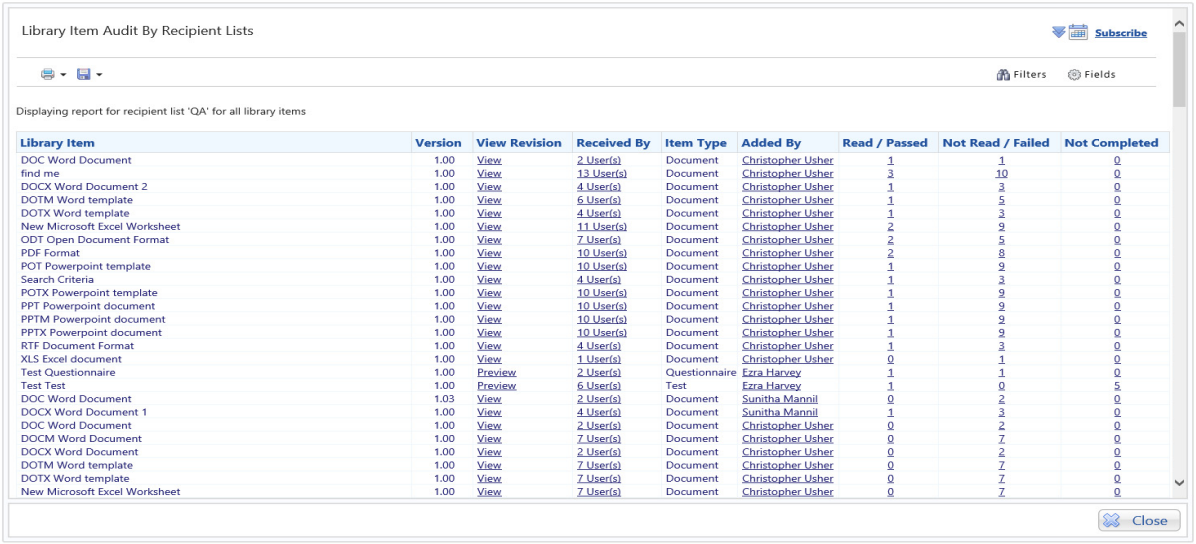
From the selected menu item, select one of the following sub-menu options:

- *Across all dates* – shows the report with no date filter.
- *For a specific date range* – shows the report for items included in Publications which were sent to members of the selected Recipient List on the days specified only.

This report shows all the library items sent to all the members of the selected Recipient List.

Note: This report differs from the previous report: If User John Smith belongs to the selected Recipient List, then this report includes the Publications sent to John Smith via the selected Recipient List and also those publications sent to John Smith directly and via any different Recipient Lists to which he belongs.

For each library item displayed, the number of users who read the Document, responded to the Questionnaire or passed the Test, or who did not read the Document, did not respond to the Questionnaire or who failed the Test is displayed.



Library Item	Version	View Revision	Received By	Item Type	Added By	Read / Passed	Not Read / Failed	Not Completed
DOC Word Document	1.00	View	2 User(s)	Document	Christopher Usher	1	1	0
find me	1.00	View	13 User(s)	Document	Christopher Usher	3	10	0
DOCX Word Document 2	1.00	View	4 User(s)	Document	Christopher Usher	1	3	0
DOTM Word template	1.00	View	6 User(s)	Document	Christopher Usher	1	5	0
DOTX Word template	1.00	View	4 User(s)	Document	Christopher Usher	1	3	0
New Microsoft Excel Worksheet	1.00	View	11 User(s)	Document	Christopher Usher	2	9	0
ODT Open Document Format	1.00	View	7 User(s)	Document	Christopher Usher	2	5	0
PDF Format	1.00	View	10 User(s)	Document	Christopher Usher	2	8	0
POT Powerpoint template	1.00	View	10 User(s)	Document	Christopher Usher	1	9	0
Search Criteria	1.00	View	4 User(s)	Document	Christopher Usher	1	3	0
POTX Powerpoint template	1.00	View	10 User(s)	Document	Christopher Usher	1	9	0
PPT Powerpoint document	1.00	View	10 User(s)	Document	Christopher Usher	1	9	0
PPTM Powerpoint document	1.00	View	10 User(s)	Document	Christopher Usher	1	9	0
PPTX Powerpoint document	1.00	View	10 User(s)	Document	Christopher Usher	1	9	0
RTF Document Format	1.00	View	4 User(s)	Document	Christopher Usher	1	3	0
XLS Excel document	1.00	View	1 User(s)	Document	Christopher Usher	0	1	0
Test Questionnaire	1.00	Preview	2 User(s)	Questionnaire	Ezra Harvey	1	1	0
Test Test	1.00	Preview	6 User(s)	Test	Ezra Harvey	1	0	5
DOC Word Document	1.03	View	2 User(s)	Document	Sunitha Mannil	0	2	0
DOCX Word Document 1	1.00	View	4 User(s)	Document	Sunitha Mannil	1	3	0
DOC Word Document	1.00	View	2 User(s)	Document	Christopher Usher	0	2	0
DOCM Word Document	1.00	View	7 User(s)	Document	Christopher Usher	0	7	0
DOCX Word Document	1.00	View	2 User(s)	Document	Christopher Usher	0	2	0
DOTM Word template	1.00	View	7 User(s)	Document	Christopher Usher	0	7	0
DOTX Word template	1.00	View	7 User(s)	Document	Christopher Usher	0	7	0
New Microsoft Excel Worksheet	1.00	View	7 User(s)	Document	Christopher Usher	0	7	0

The column headings in the above report are described in Table 74.

TABLE 74. Library Item Audit By Recipient Lists Report

Item	Description
Library Item	The name of a Document, Questionnaire or Test which was sent to the selected Recipient List.
Version	The version of the Document, Questionnaire or Test which was sent to the selected Recipient List.
View Revision	Active Link. Click *View* to view the selected Document revision or *Preview* to preview the selected Test or Questionnaire revision.

TABLE 74. Library Item Audit By Recipient Lists Report

Item	Description
Received By	The number of recipients of the library item. Active Link. Click the number of users who received this library item to see the *General Library Item* report for Publications which included this library item. See "General Library Item Report" on page 257 for more information.
Item Type	Policy Documents have the Item Type *Document.* Questionnaires have the Item Type *Questionnaire*. Tests have the Item Type *Test.*
Added By	The name of the person who uploaded or edited this version of the Document, Questionnaire or Test. Active Link. Click to open the *User Information* report for the selected user. Report. See "User Information Report" on page 121 for information.
Read / Passed	The number of people who read the Document, responded to the Questionnaire, or who passed the Test. Active Link. Click to see the *General Library Item* report for the recipients who read this document, passed this Test or responded to this Questionnaire. See "General Library Item Report" on page 257 for more information.
Not Read / Failed	The number of people who did not read the Document or who did not respond to the Questionnaire or who failed the Test but the time specified by the distribution rule *has not yet expired*. Active Link. Click to see the *General Library Item* report for the recipients who have not yet read this document, not yet passed this Test or have not yet responded to this Questionnaire. See "General Library Item Report" on page 257 for more information.
Not Completed	The number of people who did not read the Document or who did not respond to the Questionnaire or who failed the Test and they have retries remaining and the time specified by the distribution rule *has expired.* Active Link. Click to see the *General Library Item* report for the recipients who did not read this document, failed this Test or did not respond to this Questionnaire. See "General Library Item Report" on page 257 for more information.
Date Added (Hidden by default)	The date this version of the Document, Questionnaire or Test was created.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376.

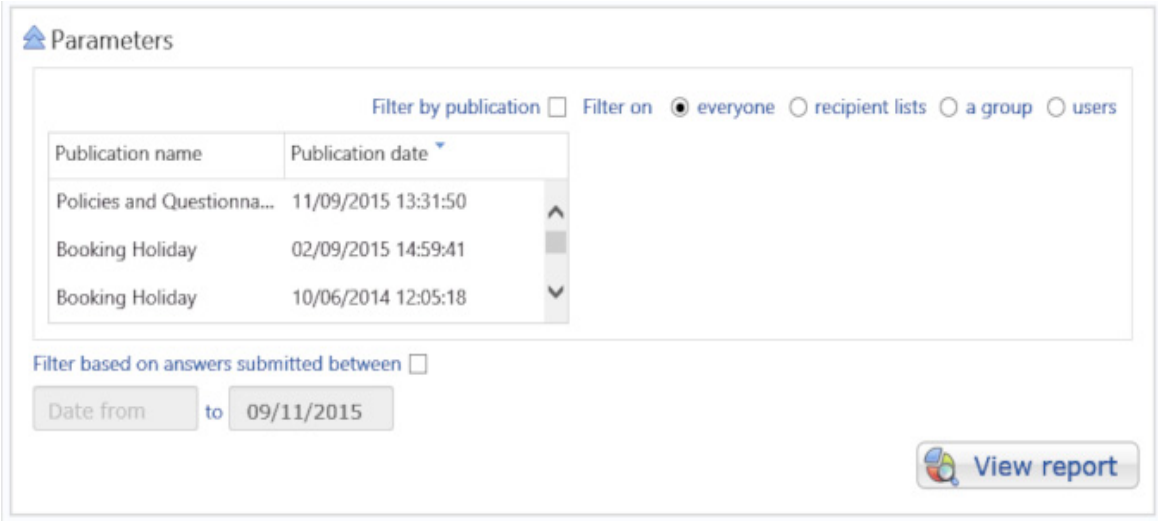
Click *Close* to return to the Recipient Lists page.

17.1.1.7.6. View Standout Answers Report For All Members Of This Recipient List

From the selected menu item, select one of the following sub-menu options:

- *Across all dates* – shows the report with no date filter.
- *For a specific date range* – shows the report for the members of the selected Recipient List who *submitted* the Questionnaire on the days specified only.

In the Standout Answer Groups' *Parameters* section (when available), you can filter by Publication, Date (from when the Questionnaire was sent), Everyone, Recipient Lists, Group and Users.



Additionally, you can select the *Filter based on answers submitted between* tick box and enter the *From* and *To* dates, as required.

This report shows a graph of the number of replies belonging to each Standout Answer Group.

The column headings in the above report are described in Table 75.

TABLE 75. Standout Answer Groups Report

Item	Description
Standout Answer Group	The name of the Standout Answer Group. Active Link. Click on a Standout Answer Group name to display the Standout Answers By Groups report for the selected Standout Answer Group. See "Standout Answers By Group Report" on page 370 for more information.
Submission Count	The number of times an answer belonging to the Standout Answer Group was given.
Last Submitted	The date and time an answer belonging to the Standout Answer Group was submitted.

Note: If no one chose the *Standout Answers* or the members of the Recipient List received Questionnaires without any *Standout Answers* (or you selected a Recipient List which did not receive any Questionnaires), you will see the message 'No report data found'.

Click *Close* to return to the Recipient Lists page.

17.1.2. Download To CSV

The contents of a Recipient List can be exported to a CSV (comma separated values) file which can then be opened in a text editor or a spreadsheet.

Select the Recipient List you want to export and click the *Download to CSV* button. The CSV file is created, and, depending on your browser, you will be able to open the file in an associated application. The CSV file is given the same name as the exported Recipient List.

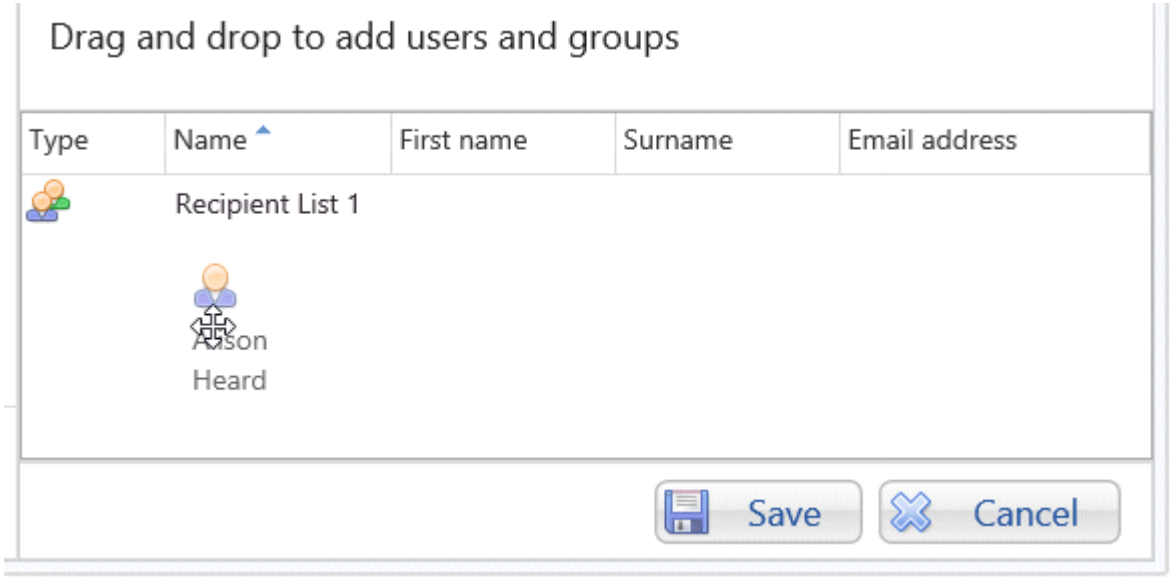
Note: The sort order of the *Selected list members* is maintained in the CSV file.

17.1.3. Create New List

This button is used to create a new, (empty) Recipient List. Enter a name for the Recipient List in the *Name* text box. Enter a description for the Recipient List in the *Description* text box.

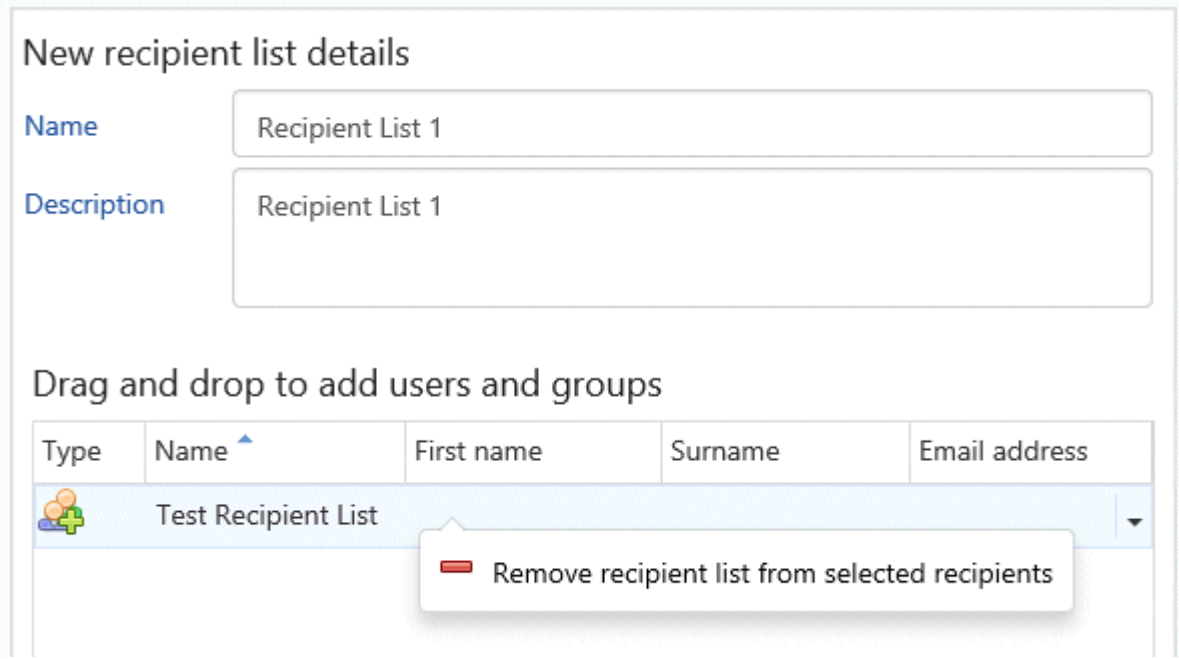
New Recipient Lists are Active by default.

Drag and drop Users, Groups or Recipient Lists to the list of members. Click on the items you want to add, while holding down the *Ctrl* key. Alternatively, use the *Shift* key to select a consecutive list of recipients by clicking the first recipient in the list and the last recipient. Drag the required item(s) to the list of members on the right.



This example shows the User Alison being added to a Recipient List which already contains *Recipient List 1*.

A member can be removed from the Recipient List by selecting the member, clicking on the black triangle on the right and selecting *Remove user from selected recipients* or *Remove recipient list from selected recipients*, as appropriate.



The selected member is removed from the Recipient List.

Click *Save* to save the Recipient List or *Cancel* to discard the changes.

17.1.4. Add To List

This button is used to create a new Recipient List and add the selected User, Recipient List or Group as the first member. Enter a name for the Recipient List in the *Name* text box. Enter a description for the Recipient List in the *Description* text box.

New Recipient Lists are Active by default.

Users, Groups and Recipient Lists can be added to the new Recipient List or removed from the Recipient List as described in “Create New List”.

17.2. Groups Tab

The *Groups* tab displays a tree-view of the Active Directory which has been synchronised to add the required Users to PolicyHub.

17.2.1. Groups Pane

The Groups pane shows the tree-view of the Active Directory being used by PolicyHub. Click on an icon to expand the tree below that node.

When an Organisational Unit or Group is selected in the tree, the Users belonging to it are displayed under *Users*.

The Groups tree-view uses the following icons:

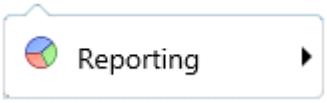
– Root node

– Domain name node

– Organisation Unit

– AD Group

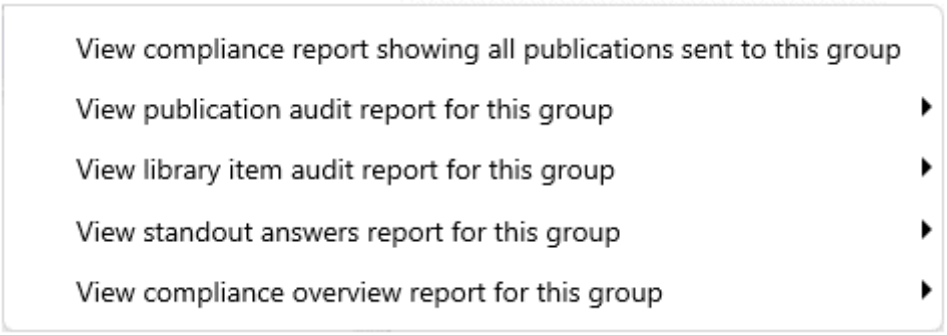
Right-click on a Group to display the Group menu.



17.2.1.1. Reporting

Reports based on Groups can be viewed. From the main menu, select *Recipient Lists*. Select the *Groups* tab, right-click on a Group and select *Reporting*.

The following menu is displayed.



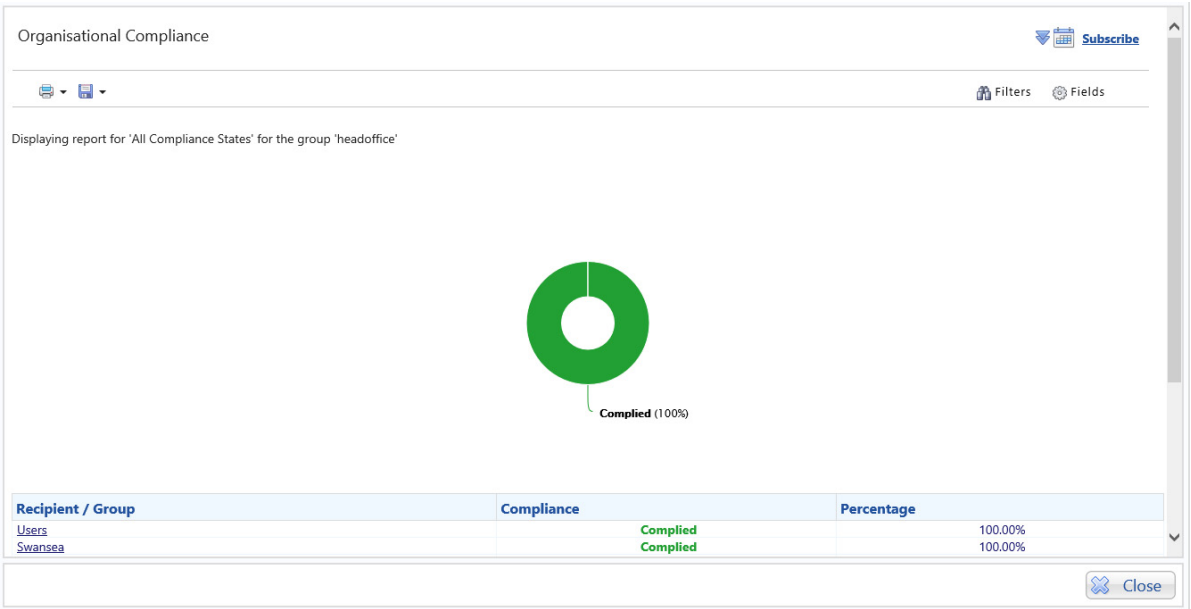
When selected, each menu item will generate a report.

To investigate in more detail, click on any of the active links (underlined text) in the report.

Note: A report toolbar is displayed on each report. See “Report Toolbar” on page 363 for a description of the toolbar.
Each report includes a *Filters* tab which displays or hides filters which can be used to refine the report. For more information about adding and or changing filtering options, see “Date Filters” on page 371, “Additional Filtering Options” on page 372 and “Changing the Default Filtering Option” on page 373.
Each report also has the capability to sort data within each column. For more information See “Sorting Report Data Within Columns” on page 376.
The reports also include a *Fields* tab which displays or hides fields which can also be used to refine the report. For more information see “Adding/Removing Columns From Reports” on page 376. Large reports contain a tool bar to navigate between report pages. For more information See “Report Pagination” on page 377.
The *Subscribe* button enables the User to create a report subscription. For more information see “Creating Subscriptions” on page 380.

17.2.1.1.1. View Compliance Report Showing All Publications Sent To This Group

The chart shows the percentage of recipients whose compliance state is *Complied*, *In Progress*, *Not Complied* or in *Error* (as appropriate) for all Publications sent to the selected Group.



The column headings in the above report are described in Table 76.

TABLE 76. Organisational Compliance Report

Item	Description
Recipient/Group	The name of a Group or User which belongs to the selected Group. Active Link. When you click on a Group name, the *Organisational Compliance* report is displayed for that Group. When you click on a User name, the *User Compliance* report is displayed for that user. See "User Compliance Report" on page 326 for more information.
Compliance	The compliance state (Complied, In Progress, Not Complied or in Error) for the displayed User or Group.
Percentage	The percentage of Publications which have the Compliance state which were sent to the recipient or members of the Group.

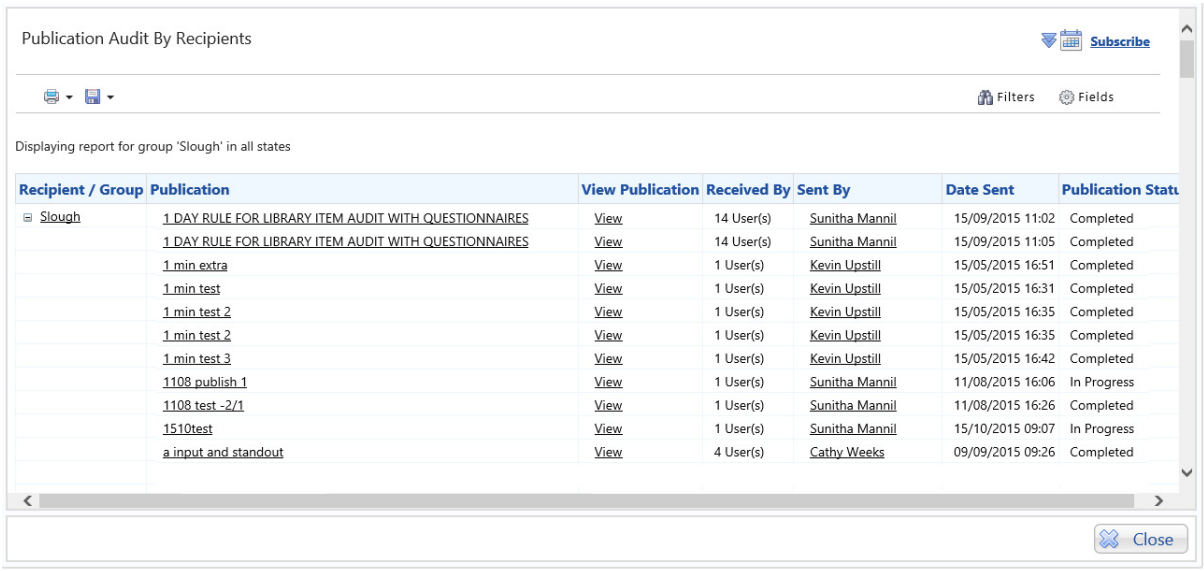
Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376

Click *Close* to return to the Recipient Lists page.

17.2.1.1.2. View Publication Audit Report For This Group

From the selected menu item, select one of the following sub-menu options:

- *Across all dates* – shows the report with no date filter.
- *For a specific date range* – shows the report for Publications which were sent to members of this Group on the days specified only. This report shows the *Name* and the *Publication Status* of Publications sent to the selected Group.



The column headings in the above report are described in Table 77.

TABLE 77. Publication Audit By Group Report

Item	Description
Recipient / Group	The name of the selected Group. Active Link. Click on a Group name to display the *Group Information* report for the selected Group.
Publication	The name of the Publication sent to the selected Group. Active Link. Click to display the *Library Item Audit By Recipients* report for the selected Publication. See "Library Item Audit By Group Report" on page 318 for more information.
View Publication	Click *View* to view the P*ublication Information* report for the selected Publication. See "Publication Information Report" on page 252 for more information.
Received By	The number of recipients belonging to the selected Group who received the Publication. When the Recipient listed is a user name, *1 User(s)* is displayed.
Sent By	The name of the person who sent the Publication. Active Link. Click to see the *User Information* report for the selected user. See "User Information Report" on page 121 for more information.

TABLE 77. Publication Audit By Group Report

Item	Description
Date Sent	The date and time the Publication was sent.
Publication Status	Publications have the status *Completed* when: • They have been complied with by all recipients. • The rule used for Publication has expired. • They were Published directly into user library. Publications are *Active* when there are still some outstanding publications to be complied with and the rule has not expired. Publications have the status *Error* when they weren't sent because of an error. Publications have the status *Retracted* when the Publication was *Retracted*. Publications have the status *Recalled* when the Publication was *Recalled*.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376

Click *Close* to return to the Recipient Lists page.

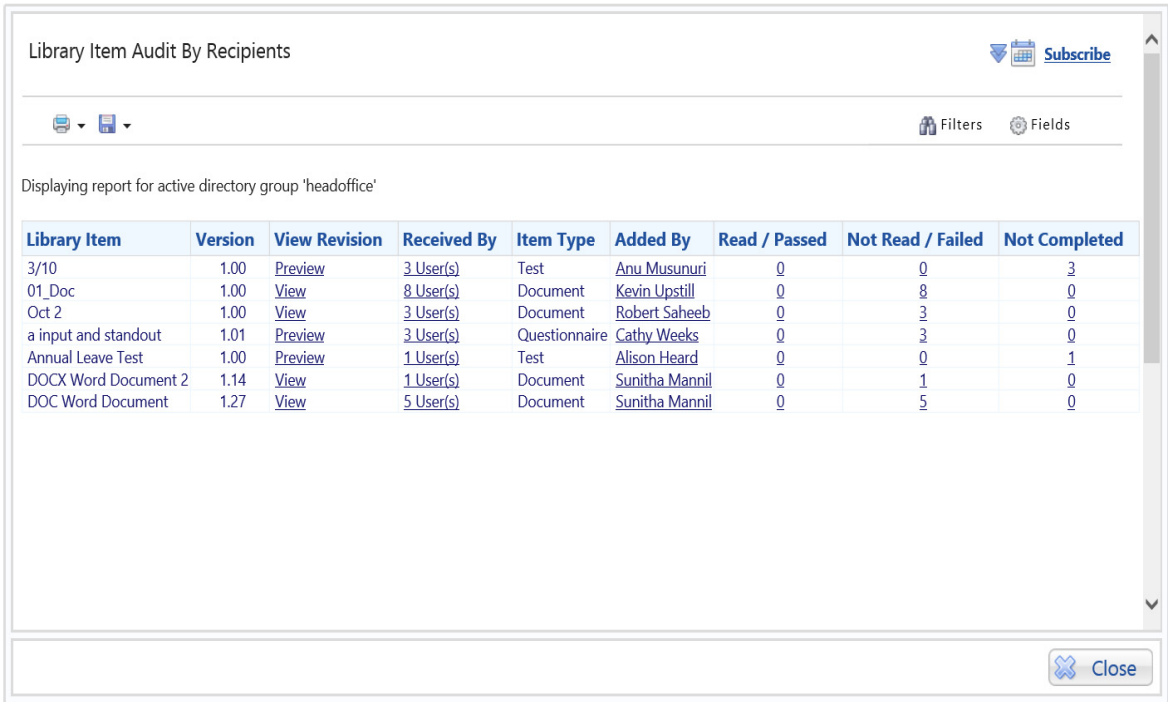
17.2.1.1.3. View Library Item Audit Report For This Group

From the selected menu item, select one of the following sub-menu options:

- *Across all dates* – shows the report with no date filter.
- *For a specific date range* – shows the report for items included in Publications which were sent to members of this Group on the days specified only.

This report shows all the library items sent to the selected Group.

For each library item, the number of Users who read the Document, responded to the Questionnaire or Passed the Test, or who did not read the Document, did not respond to the Questionnaire or who Failed the Test is displayed.



Library Item	Version	View Revision	Received By	Item Type	Added By	Read / Passed	Not Read / Failed	Not Completed
3/10	1.00	Preview	3 User(s)	Test	Anu Musunuri	0	0	3
01_Doc	1.00	View	8 User(s)	Document	Kevin Upstill	0	8	0
Oct 2	1.00	View	3 User(s)	Document	Robert Saheeb	0	3	0
a input and standout	1.01	Preview	3 User(s)	Questionnaire	Cathy Weeks	0	3	0
Annual Leave Test	1.00	Preview	1 User(s)	Test	Alison Heard	0	0	1
DOCX Word Document 2	1.14	View	1 User(s)	Document	Sunitha Mannil	0	1	0
DOC Word Document	1.27	View	5 User(s)	Document	Sunitha Mannil	0	5	0

The column headings in the above report are described in Table 78.

TABLE 78. Library Item Audit By Group Report

Item	Description
Library Item	The name of the Document, Questionnaire or Test sent to members of the selected group.
Version	The version of the Document, Questionnaire or Test sent to members of the selected Group.
View Revision	Active Link. Click *View* to view the selected Document revision or *Preview* to preview the selected Test or Questionnaire revision.
Received By	The number of recipients of the version of the Document, Questionnaire or Test. Active Link. Click to display the *General Library Item* report for the selected recipients of the version of the Document, Questionnaire or Test. See "General Library Item Report" on page 257 for more information.
Item Type	Policy Documents have the Item Type *Document.* Questionnaires have the Item Type *Questionnaire*. Tests have the Item Type *Test.*
Added By	The name of the person who uploaded or edited this version of the Document, Questionnaire or Test. Active Link. Click to open the *User Information* report for the selected user. Report. See "User Information Report" on page 121 for information.

TABLE 78. Library Item Audit By Group Report

Item	Description
Read / Passed	The number of people who read the Document, responded to the Questionnaire, or passed the Test. Active Link. Click to display the *General Library Item* report for the recipients who read the version of the Document, who responded to the version of the Questionnaire or who passed the version of the Test. See "General Library Item Report" on page 257 for more information.
Not Read / Failed	The number of people who did not read the Document, did not respond to the Questionnaire, or who failed the Test and the time specified by the distribution rule *has not yet expired*. Active Link. Click to display the *General Library Item* report for the recipients who did not read the version of the Document, who did not respond to the version of the Questionnaire or who failed the version of the Test. See "General Library Item Report" on page 257 for more information.
Not Completed	The number of people who did not read the Document, did not respond to the Questionnaire or who failed the Test and the time specified by the distribution rule *has expired*. Active Link. Click to display the *General Library Item* report for the recipients who did not complete the version of the Document, Questionnaire or Test. See "General Library Item Report" on page 257 for more information.
Date Added (Hidden by default)	The date this version of the Document, Questionnaire or Test was created.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376

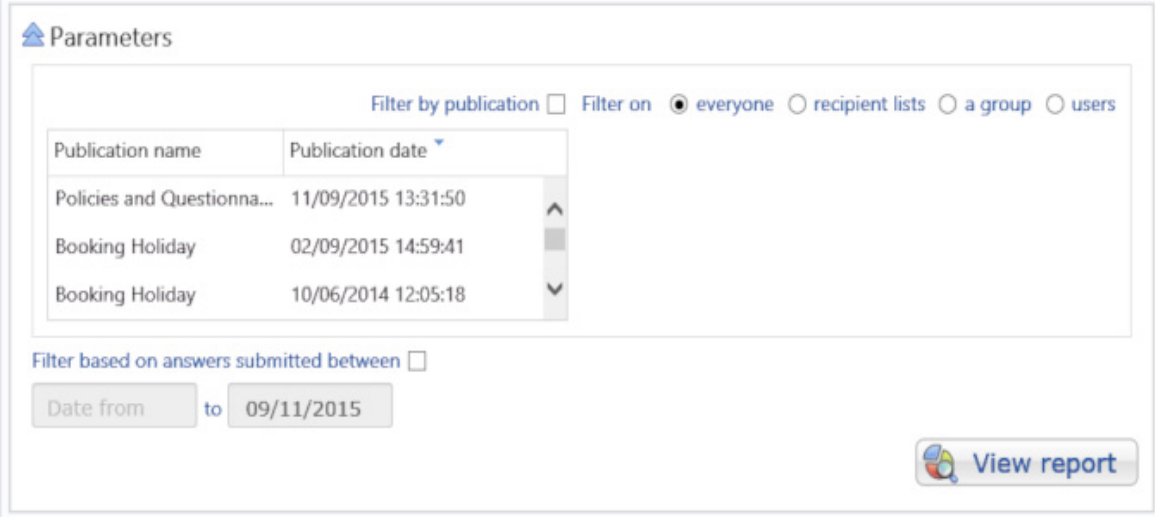
Click *Close* to return to the Recipient Lists page.

17.2.1.1.4. View Standout Answers Report For This Group

From the selected menu item, select one of the following sub-menu options:

- *Across all dates* – shows the report with no date filter.
- *For a specific date range* – shows the report for Questionnaires which were *submitted* by members of this Group on the days specified only.

In the Standout Answer Groups' *Parameters* section (when available), you can filter by Publication, Date (from when the Questionnaire was sent), Everyone, Recipient Lists, Group and Users.



Additionally, you can select the *Filter based on answers submitted between* tick box and enter the *From* and *To* dates, as required.

This report shows a graph of the number of replies belonging to each Standout Answer Group.

The column headings in the above report are described in Table 79.

TABLE 79. Standout Answers Report

Item	Description
Standout Answer Group	The name of the Standout Answer Group. Active Link. Click on a Standout Answer Group name to display the Standout Answers By Groups report for the selected Standout Answer Group. See "Standout Answers By Group Report" on page 370 for more information.
Submission Count	The number of times an answer belonging to the Standout Answer Group was given.
Last Submitted	The date and time an answer belonging to the Standout Answer Group was submitted.

For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376

Click *Close* to return to the Recipient Lists page.

Note: If no one chose the *Standout Answers* or if the members of the Group received Questionnaires without any *Standout Answers* (or you selected a Group which did not receive any Questionnaires), you will see the message 'No report data found'.

17.2.1.1.5. View Compliance Overview Report For This Group

Note: Depending on your PolicyHub licence, the *Compliance Overview Report* will display different results based on the licensed application and selections available.

This report shows all the library items sent to each member of a selected *User*, *Group* or *Hierarchy*.

Depending on the report you have chosen, the results will be described in the report title: *"Displaying report for.....(User, Group* or *Organisation)".* For further information on user and hierarchic reporting see "Organisation" on page 339.

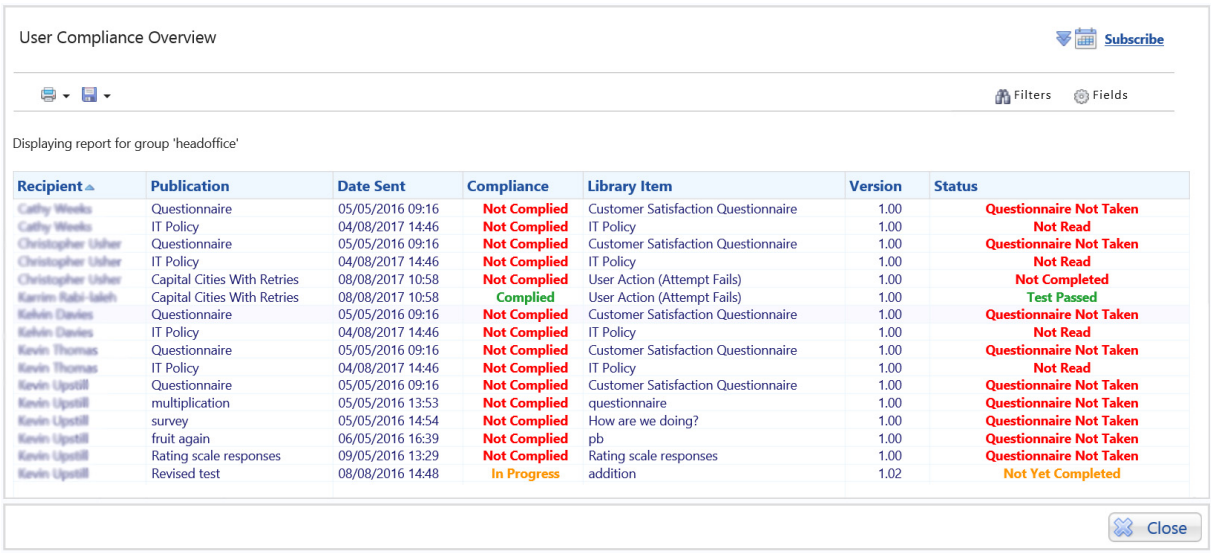
From the selected menu item, select one of the following sub-menu options:

- Across all dates – shows the report with no date filter.
- For a specific date range – shows the report for Publications sent to members of this Group on the days specified only.

For each User, the library items which were sent in each Publication are listed.

Both the Publication compliance and the current status of each library item is displayed.

By default, library items that have a publication rule "Send Direct To User Library" are not displayed in the *Compliance Overview Report.* To change the filter settings for this report see "Compliance Overview Report Filter Options" on page 324.



Recipient	Publication	Date Sent	Compliance	Library Item	Version	Status
[redacted]	Questionnaire	05/05/2016 09:16	Not Complied	Customer Satisfaction Questionnaire	1.00	Questionnaire Not Taken
[redacted]	IT Policy	04/08/2017 14:46	Not Complied	IT Policy	1.00	Not Read
[redacted]	Questionnaire	05/05/2016 09:16	Not Complied	Customer Satisfaction Questionnaire	1.00	Questionnaire Not Taken
[redacted]	IT Policy	04/08/2017 14:46	Not Complied	IT Policy	1.00	Not Read
[redacted]	Capital Cities With Retries	08/08/2017 10:58	Not Complied	User Action (Attempt Fails)	1.00	Not Completed
[redacted]	Capital Cities With Retries	08/08/2017 10:58	Complied	User Action (Attempt Fails)	1.00	Test Passed
[redacted]	Questionnaire	05/05/2016 09:16	Not Complied	Customer Satisfaction Questionnaire	1.00	Questionnaire Not Taken
[redacted]	IT Policy	04/08/2017 14:46	Not Complied	IT Policy	1.00	Not Read
[redacted]	Questionnaire	05/05/2016 09:16	Not Complied	Customer Satisfaction Questionnaire	1.00	Questionnaire Not Taken
[redacted]	IT Policy	04/08/2017 14:46	Not Complied	IT Policy	1.00	Not Read
[redacted]	Questionnaire	05/05/2016 09:16	Not Complied	Customer Satisfaction Questionnaire	1.00	Questionnaire Not Taken
[redacted]	multiplication	05/05/2016 13:53	Not Complied	questionnaire	1.00	Questionnaire Not Taken
[redacted]	survey	05/05/2016 14:54	Not Complied	How are we doing?	1.00	Questionnaire Not Taken
[redacted]	fruit again	06/05/2016 16:39	Not Complied	pb	1.00	Questionnaire Not Taken
[redacted]	Rating scale responses	09/05/2016 13:29	Not Complied	Rating scale responses	1.00	Questionnaire Not Taken
[redacted]	Revised test	08/08/2016 14:48	In Progress	addition	1.02	Not Yet Completed

The column headings in the above table are described in Table 80.

TABLE 80. User Compliance Overview Report

Item	Description
Recipient	The name of a User belonging to the selected Group.
Publication	The name of the Publication sent to the members of the selected Group.
Date Sent	The date the Publication was sent.
Compliance	The compliance state (*Complied*, *In Progress, Not Complied* or in *Error*) of the Publication.
Library Item	The name of the library item included in the Publication.
Version	The version of the library item included in the Publication.

TABLE 80. User Compliance Overview Report

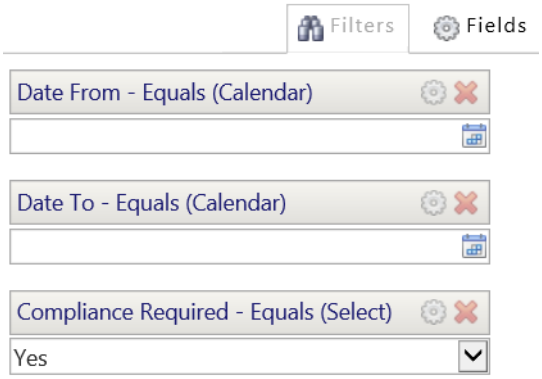
Item	Description
Status	The current status of the library item. For example: • *Not Read* – The User did not read the Document before the Publication expired. Either the User did not comply or there was an error when the Publication was sent and the User did not receive the Publication. • *Not Yet Read* – Although the User has not yet read the Document, they can still confirm the Document as read before the Publication expires. • *Document Read* – The User read the Document. • *Not Completed* – The User did not pass the Test before the Publication expired although there were still Test retries remaining. • *Not Yet Completed* – Although the User has not yet passed the Test, they can still pass the Test before the Publication expires. • *Test Failed* – The User did not pass the Test in the allotted number of retries. • *Test Passed* – The User passed the Test. • *Questionnaire Not Taken* – The User did not complete the Questionnaire before the Publication expired. • *Questionnaire Not Yet Completed* – Although the User has not yet completed the Questionnaire, they can still complete the Questionnaire before the Publication expires. • *Questionnaire Taken* – The User completed the Questionnaire.
Publication Status (Hidden by default)	Publications have the status *Completed* when: • They have been complied with by all recipients. • The rule used for Publication has expired. • They were Published directly into user library. Publications are *Active* when there are still some outstanding publications to be complied with and the rule has not expired. Publications have the status *Error* when they weren't sent because of an error. Publications have the status *Retracted* when the Publication was *Retracted*. Publications have the status *Recalled* when the Publication was *Recalled*.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376

Click *Close* to return to the Recipient Lists page.

17.2.1.1.5.1. Compliance Overview Report Filter Options

In addition to the "Date Filters" described in "Reporting", the *User Compliance Overview Report* has an additional filter called *Compliance Required*.



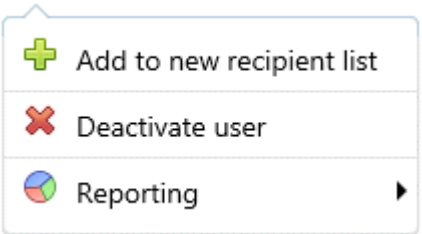
By default, the *Compliance Required* filter is set to *Yes* and only displays the *Compliance* data that was not sent directly to a users library. By choosing *No* from the drop-down list, the report will include all *Compliance* data including "Send Direct To User Library" recipients.

17.2.2. Users Pane

When an Organisational Unit or Group is selected in the tree, the Users belonging to it are displayed in the Users pane.

Multiple Users can be selected by holding down the *Ctrl* key while clicking on the Users. Consecutive Users can be selected by selecting the first User and holding down the *Shift* key while selecting the last Users.

Right-click on a User name to display the User menu.



17.2.2.1. Add To New Recipient List

Select to create a new Recipient List with the selected Recipient added as a member.

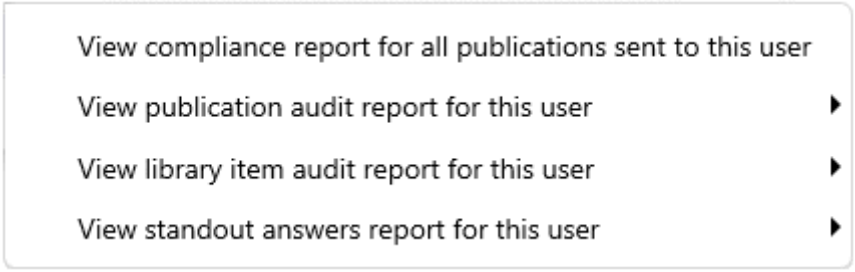
17.2.2.2. Activate/Deactivate User

When an Active User is selected, the *Deactivate* menu option is displayed. Select the *Deactivate* button to deactivate the selected User accounts. Inactive accounts cannot be used and will not allow the user to log in to PolicyHub.

When multiple Users are selected and they are all Inactive, the *Activate* button is displayed. Click the *Activate* button to activate the selected User accounts.

17.2.2.3. Reporting

You can view reports based on individual Users. From the main menu, select *Recipient Lists*, select a Group, right-click on a User and select *Reporting*. The following menu is displayed.



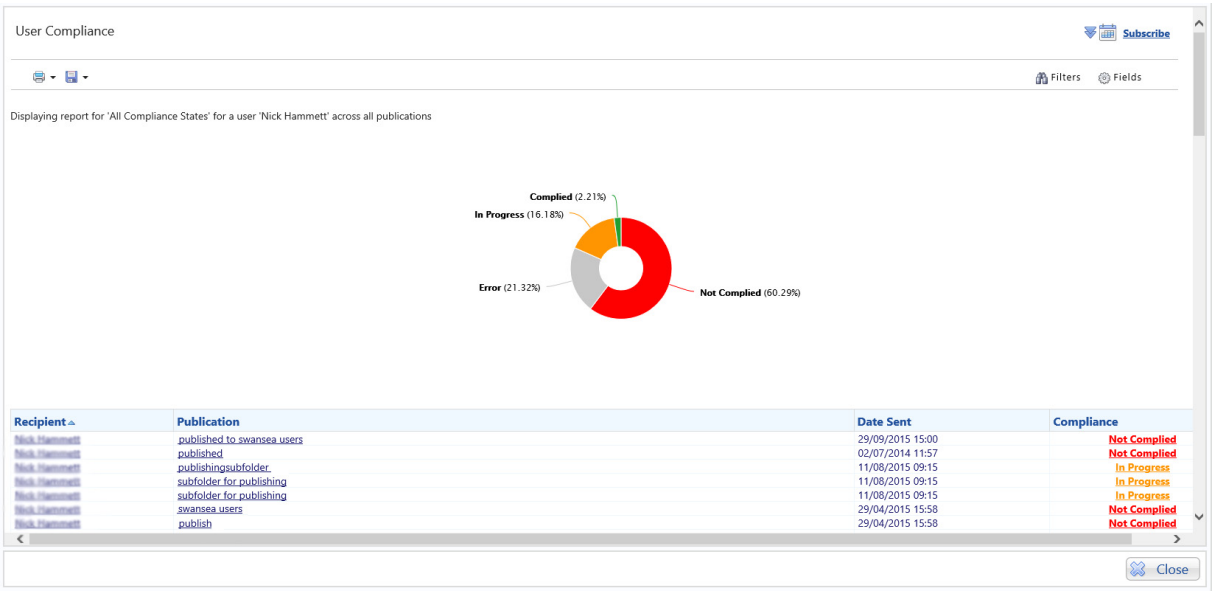
When selected, each menu item will generate a report.

To investigate in more detail, click on any of the active links (underlined text) in the report.

Note: A report toolbar is displayed on each report. See “Report Toolbar” on page 363 for a description of the toolbar.
Each report includes a *Filters* tab which displays or hides filters which can be used to refine the report. For more information about adding and or changing filtering options, see “Date Filters” on page 371, “Additional Filtering Options” on page 372 and “Changing the Default Filtering Option” on page 373.
Each report also has the capability to sort data within each column. For more information See “Sorting Report Data Within Columns” on page 376.
The reports also include a *Fields* tab which displays or hides fields which can also be used to refine the report. For more information see “Adding/Removing Columns From Reports” on page 376. Large reports contain a tool bar to navigate between report pages. For more information See “Report Pagination” on page 377.
The *Subscribe* button enables the User to create a report subscription. For more information see “Creating Subscriptions” on page 380.

17.2.2.3.1. View Compliance Report For All Publications Sent To This User

The chart shows the percentage of Publications for which the selected User's status is *Complied*, *In Progress*, *Not Complied* or in *Error*.



The column headings in the above report are described in Table 81.

TABLE 81. User Compliance Report

Item	Description
Recipient	The name of the selected User.
Publication	The name of the Publication sent to the selected User. Active Link. Click to display the *User Compliance* report for all recipients of the selected Publication.
Date Sent	The date the Publication was sent.

TABLE 81. User Compliance Report

Item	Description
Compliance	The compliance status (Complied, In Progress, Not Complied or in Error) of the selected User to the Publication. Active Link. Click a user's Compliance Status to display the *User Action* report for the selected user and Compliance Status. See "User Action Report" on page 270 for more information.
Publication Status (Hidden by default)	Publications have the status *Completed* when: • They have been complied with by all recipients. • The rule used for Publication has expired. • They were Published directly into user library. Publications are *Active* when there are still some outstanding publications to be complied with and the rule has not expired. Publications have the status *Error* when they weren't sent because of an error. Publications have the status *Retracted* when the Publication was *Retracted*. Publications have the status *Recalled* when the Publication was *Recalled*.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376

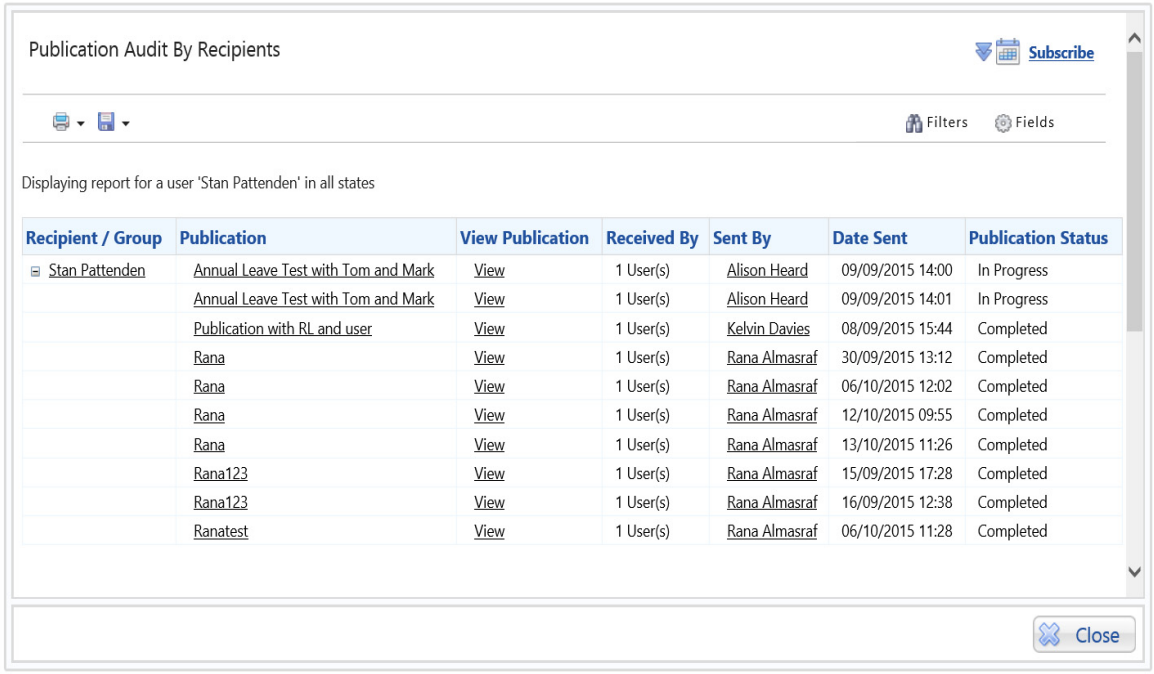
Click *Close* to return to the Recipient Lists page.

17.2.2.3.2. View Publication Audit Report For This User

From the selected menu item, select one of the following sub-menu options:

- *Across all dates* – shows the report with no date filter.
- *For a specific date range* – shows the report for this User for Publications which were sent to this User on the days specified only.

This report shows the *Publication Status* of each Publication sent to the selected User.



The column headings in the above report are described in Table 82.

TABLE 82. Publication Audit By User Report

Item	Description
Recipient / Group	The name of the User who received the Publication. Active Link. Click to see the *User Information* report for the selected recipient. See "User Information Report" on page 121 for more information.
Publication	The name of the Publication sent to the selected User. Active Link. Click to display the *Library Item Audit By Recipients* report for the selected Publication. See "Library Item Audit By Recipients Report" on page 330 for more information.
View Publication	Click *View* to view the *Publication Information* report for the selected Publication. See "Publication Information Report" on page 252 for more information.
Received By	The number of users who received the Publication. When the Recipient listed is a User name, *1 User(s)* is displayed.
Sent By	The name of the person who sent the Publication. Active Link. Click to see the *User Information* report for the selected user. See "User Information Report" on page 121 for more information.

TABLE 82. Publication Audit By User Report

Item	Description
Date Sent	The date and time the Publication was sent.
Publication Status	Publications have the status *Completed* when: • They have been complied with by all recipients. • The rule used for Publication has expired. • They were Published directly into user library. Publications are *Active* when there are still some outstanding publications to be complied with and the rule has not expired. Publications have the status *Error* when they weren't sent because of an error. Publications have the status *Retracted* when the Publication was *Retracted*. Publications have the status *Recalled* when the Publication was *Recalled*.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376

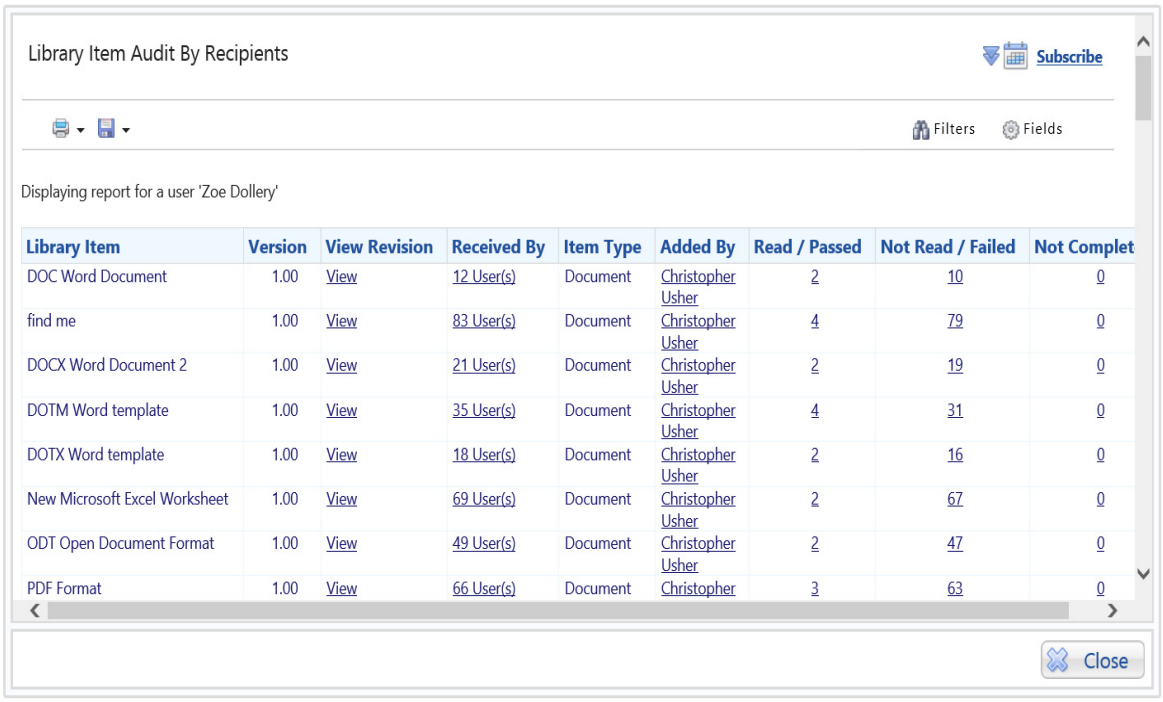
Click *Close* to return to the Recipient Lists page.

17.2.2.3.3. View Library Item Audit Report For This User

From the selected menu item, select one of the following sub-menu options:

- *Across all dates* – shows the report with no date filter.
- *For a specific date range* – shows the report for items included in Publications which were sent to this User on the days specified only.

This report shows all the library items sent to the selected User.



Library Item	Version	View Revision	Received By	Item Type	Added By	Read / Passed	Not Read / Failed	Not Complet
DOC Word Document	1.00	View	12 User(s)	Document	Christopher Usher	2	10	0
find me	1.00	View	83 User(s)	Document	Christopher Usher	4	79	0
DOCX Word Document 2	1.00	View	21 User(s)	Document	Christopher Usher	2	19	0
DOTM Word template	1.00	View	35 User(s)	Document	Christopher Usher	4	31	0
DOTX Word template	1.00	View	18 User(s)	Document	Christopher Usher	2	16	0
New Microsoft Excel Worksheet	1.00	View	69 User(s)	Document	Christopher Usher	2	67	0
ODT Open Document Format	1.00	View	49 User(s)	Document	Christopher Usher	2	47	0
PDF Format	1.00	View	66 User(s)	Document	Christopher	3	63	0

The column headings in the above report are described in Table 83.

TABLE 83. Library Item Audit By Recipients Report

Item	Description
Library Item	The name of the Document, Questionnaire or Test sent to members of the selected group.
Version	The version of the Document, Questionnaire or Test sent to members of the selected Group.
View Revision	Active Link. Click *View* to view the selected Document revision or *Preview* to preview the selected Test or Questionnaire revision.
Received By	The number of recipients of the version of the Document, Questionnaire or Test. Active Link. Click to display the *General Library Item* report for the selected recipients of the version of the Document, Questionnaire or Test. See "General Library Item Report" on page 257 for more information.
Item Type	Policy Documents have the Item Type *Document*. Questionnaires have the Item Type *Questionnaire*. Tests have the Item Type *Test*.
Added By	The name of the person who uploaded or edited this version of the Document, Questionnaire or Test. Active Link. Click to open the *User Information* report for the selected user. Report. See "User Information Report" on page 121 for information.

TABLE 83. Library Item Audit By Recipients Report

Item	Description
Read / Passed	The number of people who read the Document, responded to the Questionnaire, or passed the Test. Active Link. Click to display the *General Library Item* report for the recipients who read the version of the Document, who responded to the version of the Questionnaire or who passed the version of the Test. See "General Library Item Report" on page 257 for more information.
Not Read / Failed	The number of people who did not read the Document, did not respond to the Questionnaire, or who failed the Test and the time specified by the distribution rule *has not yet expired*. Active Link. Click to display the *General Library Item* report for the recipients who did not read the version of the Document, who did not respond to the version of the Questionnaire or who failed the version of the Test. See "General Library Item Report" on page 257 for more information.
Not Completed	The number of people who did not read the Document, did not respond to the Questionnaire or who failed the Test and the time specified by the distribution rule *has expired*. Active Link. Click to display the *General Library Item* report for the recipients who did not complete the version of the Document, Questionnaire or Test. See "General Library Item Report" on page 257 for more information.
Date Added (Hidden by default)	The date this version of the Document, Questionnaire or Test was created.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376

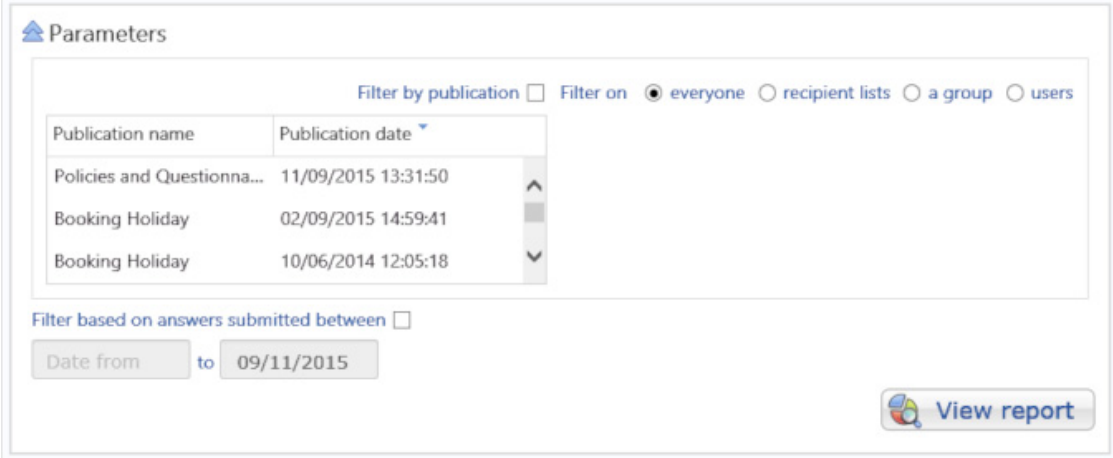
Click *Close* to return to the Recipient Lists page.

17.2.2.3.4. View Standout Answers Report For This User

From the selected menu item, select one of the following sub-menu options:

- *Across all dates* – shows the report with no date filter.
- *For a specific date range* – shows the report for Questionnaires which were *submitted* by this User on the days specified only.

In the Standout Answers Report's *Parameters* section (when available), you can filter by Publication, Date (from when the Questionnaire was sent), Everyone, Recipient Lists, Group and Users.



Additionally, you can select the *Filter based on answers submitted between* tick box and enter the *From* and *To* dates, as required.

This report shows a graph of the number of replies belonging to each Standout Answer Group.

The column headings in the above report are described in Table 84.

TABLE 84. Standout Answers Report

Item	Description
Standout Answer Group	The name of the Standout Answer Group. Active Link. Click on a Standout Answer Group name to display the Standout Answers By Groups report for the selected Standout Answer Group. See "Standout Answers By Group Report" on page 370 for more information.
Submission Count	The number of times an answer belonging to the Standout Answer Group was given.
Last Submitted	The date and time an answer belonging to the Standout Answer Group was submitted.

Note: For more information about adding and or changing filtering and field options, see "Date Filters" on page 371, "Additional Filtering Options" on page 372, "Changing the Default Filtering Option" on page 373 and "Adding/Removing Columns From Reports" on page 376

Click *Close* to return to the Recipient Lists page.

17.2.3. Activate/Deactivate Buttons

When multiple Users are selected and they are all Active, the *Deactivate* button is displayed. Click the *Deactivate* button to deactivate the selected User accounts. Inactive accounts can not be used and will not allow the User to log in to PolicyHub.

When multiple Users are selected and they are all Inactive, the *Activate* button is displayed. Click the *Activate* button to activate the selected User accounts.

17.2.4. Search For A User

To search for a User, type the required name into the *Search users* text box.

To search for an exact match, select the *Only return users that match exactly* tick box.

Click the *Search* button. The results are displayed under the *Users* heading by *First name*, *Surname* and *Member of.*

Member of shows the names of the Groups the returned item is a member of.

Drag *Users* and *Groups* to the area below *Drag and drop to add users and groups* in the right-hand pane, as required.

17.2.5. 'Show' Options

There are two options near the bottom of this page:

- *Show inactive accounts* – When *cleared*, inactive User accounts are not displayed. When *selected*, inactive accounts are displayed. Accounts are made active or inactive from within PolicyHub. See "Activate/Deactivate Buttons" on page 333.
- *Show disabled accounts* – When *cleared*, disabled User accounts are not displayed. When *selected*, disabled User accounts are displayed. Disabled User accounts have the icon:

Note: Accounts are disabled or enabled externally and cannot be changed from within PolicyHub.

17.3. Unassigned Users Tab

17.3.1. Users Not In A Recipient List

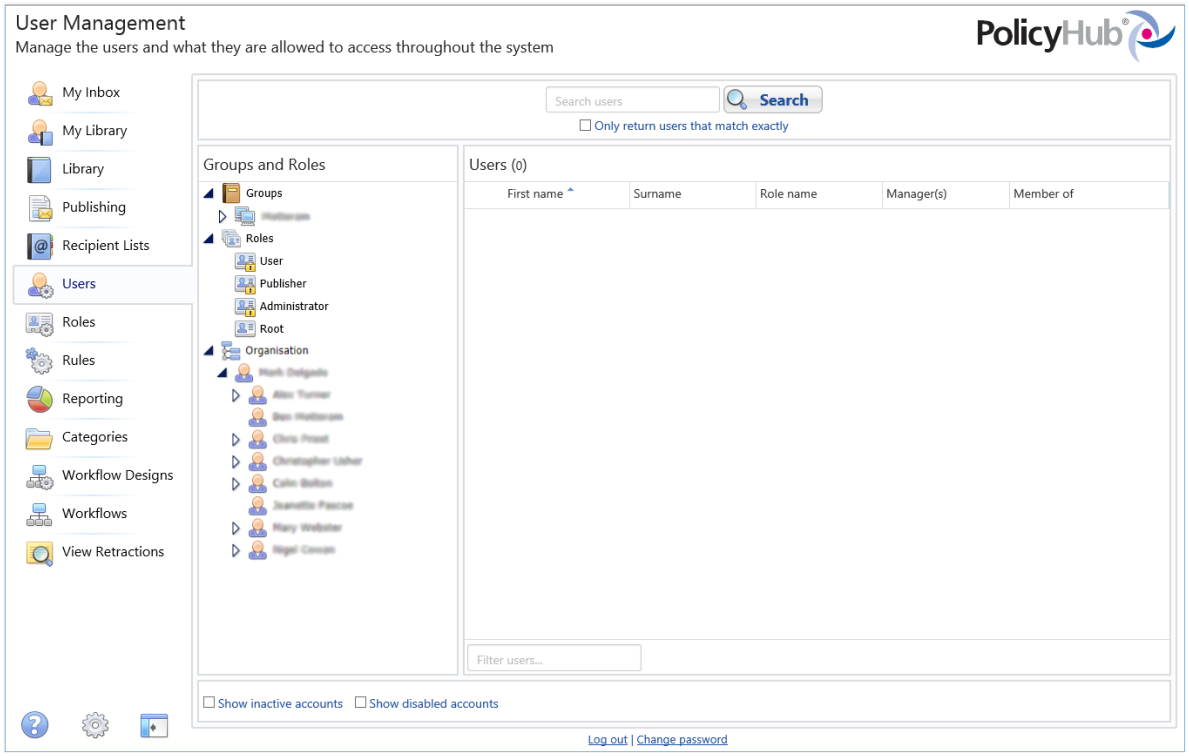
All Users who are not in a Recipient List are shown on this tab.

17.3.2. 'Show' Options

- *Show users only in unnamed recipient lists* – when this option is selected, Users who have been added to an *unnamed* Recipient List are displayed (in addition to the Users who do not belong to any named or unnamed Recipient Lists).
- *Show users only in inactive recipient lists* – when this option is selected, Users who belong to one or more *Inactive* Recipient Lists (but not to any *Active* Recipient Lists) are displayed (in addition to the Users who do not belong to any named Recipient Lists). See "Activate/Deactivate Recipient List" on page 299 for information on how to deactivate a Recipient List.

18. Users

On the *User Management* page, you can display a User's name and *Role*. You can also change the Role the User belongs to and activate or deactivate a User.



18.1. Groups, Roles and Organisation

The *Groups* tree can be expanded to show the contents of each Group (node) in the tree. When a Group contains Users, the *First name*, *Surname* and *Role name* are displayed for each User belonging to that Group.

Roles are listed below the Groups. Select a Role to display the *First name*, *Surname* and the *Role name* for each User in that Role.

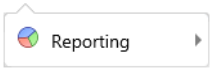
To change a User's Role, double-click on the *Role name* and select a new Role from the drop-down list. The User is removed from the current Role and is put in the selected Role.

The *Organisation* tree shows a hierarchical structure of the company with managers together with their direct reports. The primary feature of the *Organisation* feature is to delegate reporting compliance to line managers.

Note: Depending on your PolicyHub licence, the *Organisation* tree and the User *Manager(s)* column may not be available in your application software.

18.1.1. Group Menu

Right-click on a Group in the *Groups and Roles* pane to display the Group menu.



18.1.1.1. Reporting

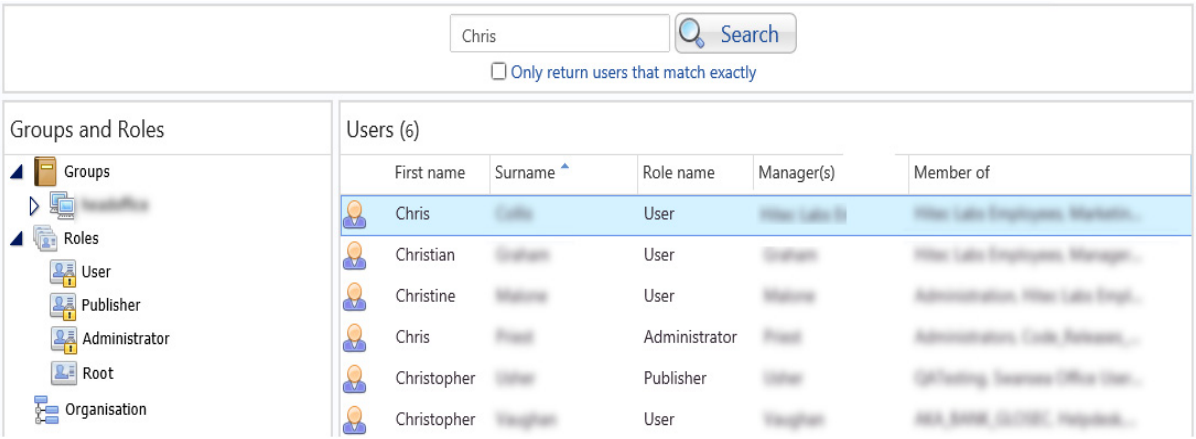
Reports can be generated to provide compliance and audit information about Groups. Right-click on a Group and select *Reporting* from the menu. See "Reporting" on page 314 for more information on Group reports.

18.2. Users

The *Users* pane displays the Users belonging to the selected Group or Role. By default, the names are alphabetically sorted (A to Z) under the *First name* column. The number of Users in the *Users* pane is displayed in brackets.

18.2.1. Searching For Users' Names

To search for a particular *User*, type the first part of either the first name or surname into the *Search users* text box, then press *Enter* or click on the *Search* button.



Searches are applied to all active accounts (and, when S*how inactive accounts* is selected, inactive accounts too), regardless of which Group or Role is selected in the *Groups and Roles* pane. Any text entered in the *Search users* box must be located at the beginning of the *First name* or *Surname* to match the search.

All the Users returned from a search (*Chris* in the above example) are displayed under the *Users* heading by *First name*, *Surname*, *Role name* and *Member of*.

To search for an exact match, select *Only return users that match exactly*. In this example, if *Only return users that match exactly* is selected, only the two Users called *Chris* will be displayed.

Member of displays the Groups the User belongs to. When the User is a member of several Groups which cannot all be displayed, hover the mouse over the list to display a tooltip showing all the Groups.

By default, the names are alphabetically sorted (A to Z) under the *First name* column.

Each heading can be individually sorted by clicking on the heading.

18.2.2. Filtering Users' Names

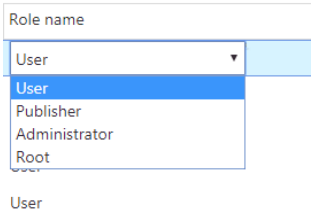
When there are names in the *Users* pane, these names can be filtered to reduce the names displayed. Enter the text you want to be present in all the names in the *Users* pane. The names in the *Users* pane are filtered and only those matching the text in the filter box are displayed.

The text in the *Filter users...* box will match a User name if the text is found (exactly as typed) anywhere in the name. Filters are applied to the Users who are returned from a search, or who belong to the selected Group or Role, as appropriate.

For example, if, after performing the search described above, the letter *a* is entered in the filter text box, only those User accounts in the list which have an *a* anywhere in either their *First name* or their *Surname* will be displayed.

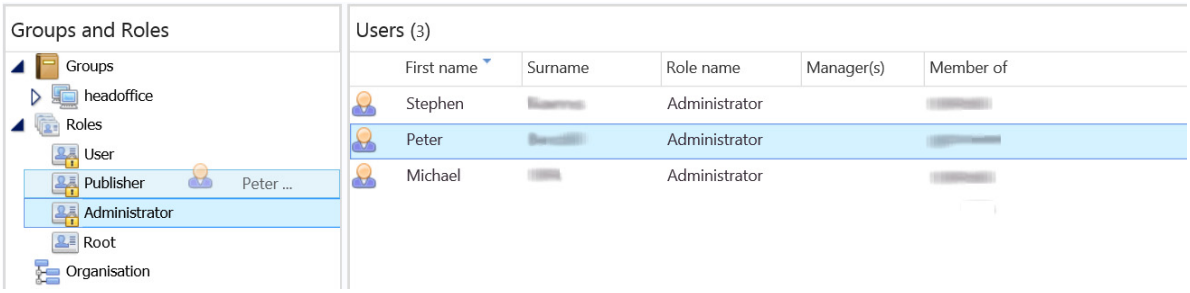
18.2.3. Changing The Role

A User's Role can be changed by double-clicking on the *Role name* for that User and then clicking on the arrow to display a drop-down list of available Roles. Select the new Role from the list.



Alternatively, a User can be moved to a different Role by selecting the User in the *Users* pane and dragging them to a Role in the *Groups and Roles* pane. Multiple Users can be selected by holding down the *Ctrl* key while clicking on all the required Users. Consecutive Users can be selected by holding down the *Shift* key and clicking on the first User in the list and the last User in the list.

In the example below, *Peter* is currently a member of the Role *Administrator*, but this User is being moved to the Role *Publisher*.



18.2.4. User Menu

Right-click on a User in the *Users* pane to display the User menu.

18.2.4.1. Activate

Select *Activate* to activate the selected User account. The User will be able to log in to PolicyHub when their account is active.

18.2.4.2. Deactivate

Select *Deactivate* to deactivate the selected User account. The User will not be able to log in to PolicyHub while their account is inactive.

18.2.4.3. Reporting

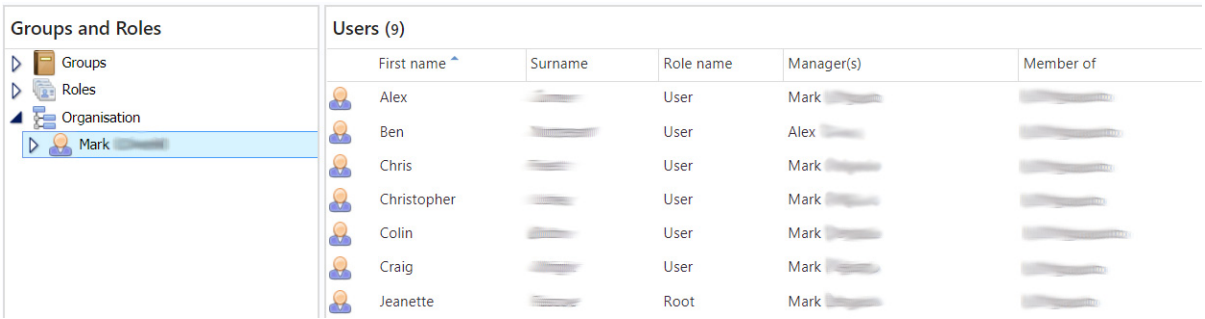
Reports can be generated to provide compliance and audit information about Users. Right-click on a User and select *Reporting* from the menu. See "Reporting" on page 325 for more information on User reports.

18.3. Organisation

Note: Depending on your PolicyHub licence, the *Organisation* tree and the User *Manager(s)* column may not be available in your application software.

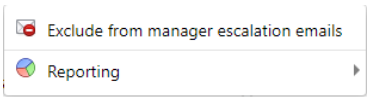
The *Organisation* tree can be expanded individually through each level to show members at every level in the organisation tiered structure. By default only the highest level in the *Organisation* tree is displayed.

When a person is selected in the *Organisation* tree, all Users reporting to that person are displayed by *First name*, *Surname*, *Role name, Manager(s)* and *Member of* in the *Organisation* pane. The *Manager(s)* column will display all managers for a particular User as depicted in the *Organisation* tree.



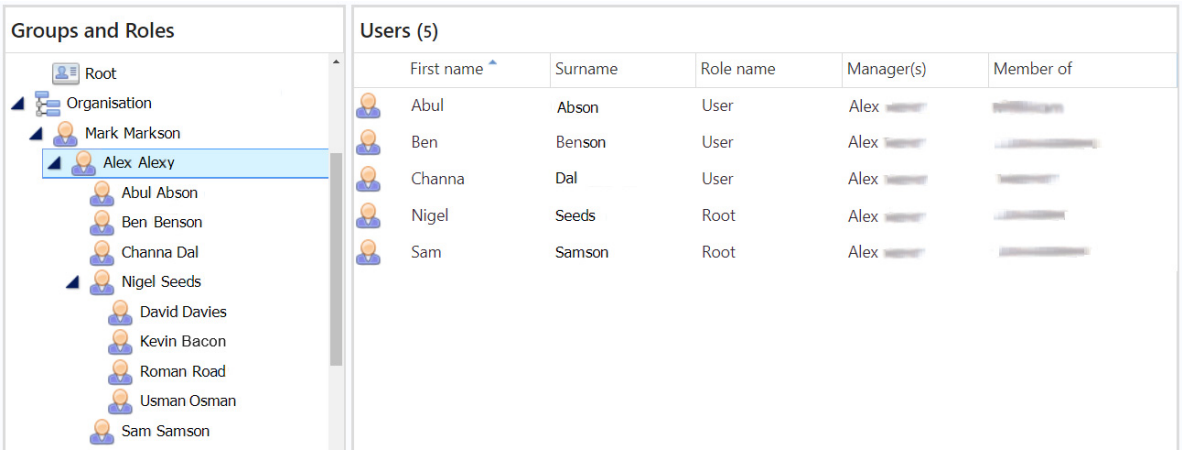
Any User which doesn't manage other Users or is not managed by other Users will not appear anywhere in the *Organisation* tree.

Right-clicking on a User in the *Organisation* tree will display the following menu.



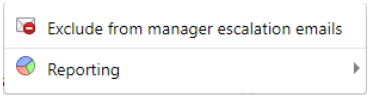
18.3.1. Organisation Structure - Overview

In the example below, Mark is the highest level manager. Alex reports to Mark with Abul, Ben, Channa and Sam reporting to Alex. Nigel reports to Alex and has David, Kevin Roman and Usman reporting to him.



18.3.2. Organisation User Menu

Right-clicking on a User in the *Organisation* Users pane will display the User menu.



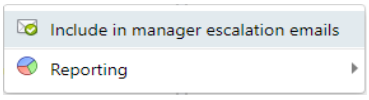
18.3.3. Exclude From Manager Escalation Emails

Select *Exclude from manager escalation emails* to stop sending escalation emails to the user selected see “Escalation emails” on page 241 for further details.

This menu selection is particularly useful where a user may have multiple managers. In this situation some managers may not want to see the escalation emails and can be excluded from the communication.

Note: The *Exclude from mangers escalation emails* menu is only available to those Users that have people reporting to them.

18.3.4. Include In Manager Escalation Emails



Select *Include in manager escalation emails* to send escalation emails to the user selected see “Escalation emails” on page 241 for further details.

Note: The *Include from mangers escalation emails* menu is only available to those Users that have people reporting to them.

18.3.5. Reporting

Compliance overview reports can be generated either from the *Organisation* icon or from a *User* icon.

Right-click the *Organisation* icon to select either:

- *View compliance overview report for all users in the hierarchy*. This will display a report for all users in the hierarchy.
- *View compliance overview report only for users at the top of the hierarchy*. This will display a report for users at the top of the hierarchy.

See “View Compliance Overview Report For This Group” on page 321 for further information.

Right-click the *User* icon to select either:

- *View compliance overview report for users that report directly to this user.* This will display a report only of the Users that report directly to this User.
- *View compliance overview report for everyone that reports to this user*. This will display a report of everyone that reports to this User.

See “View Compliance Overview Report For This Group” on page 321 for further information.

18.3.6. Searching For A User In The Organisation

To search for a particular User, type the first part of either the first name or surname into the Search users text box. See “Searching For Users’ Names” on page 337.

18.3.7. Filtering Users’ Names

When there are names in the *Organisation* pane, these names can be filtered to reduce the names displayed. See “Filtering Users’ Names” on page 337.

18.3.8. Changing The Role

A User’s Role can be changed by double-clicking on the *Role name* for that User and then clicking on the arrow to display a drop-down list of available Roles. See “Changing The Role” on page 338.

18.4. Display Options

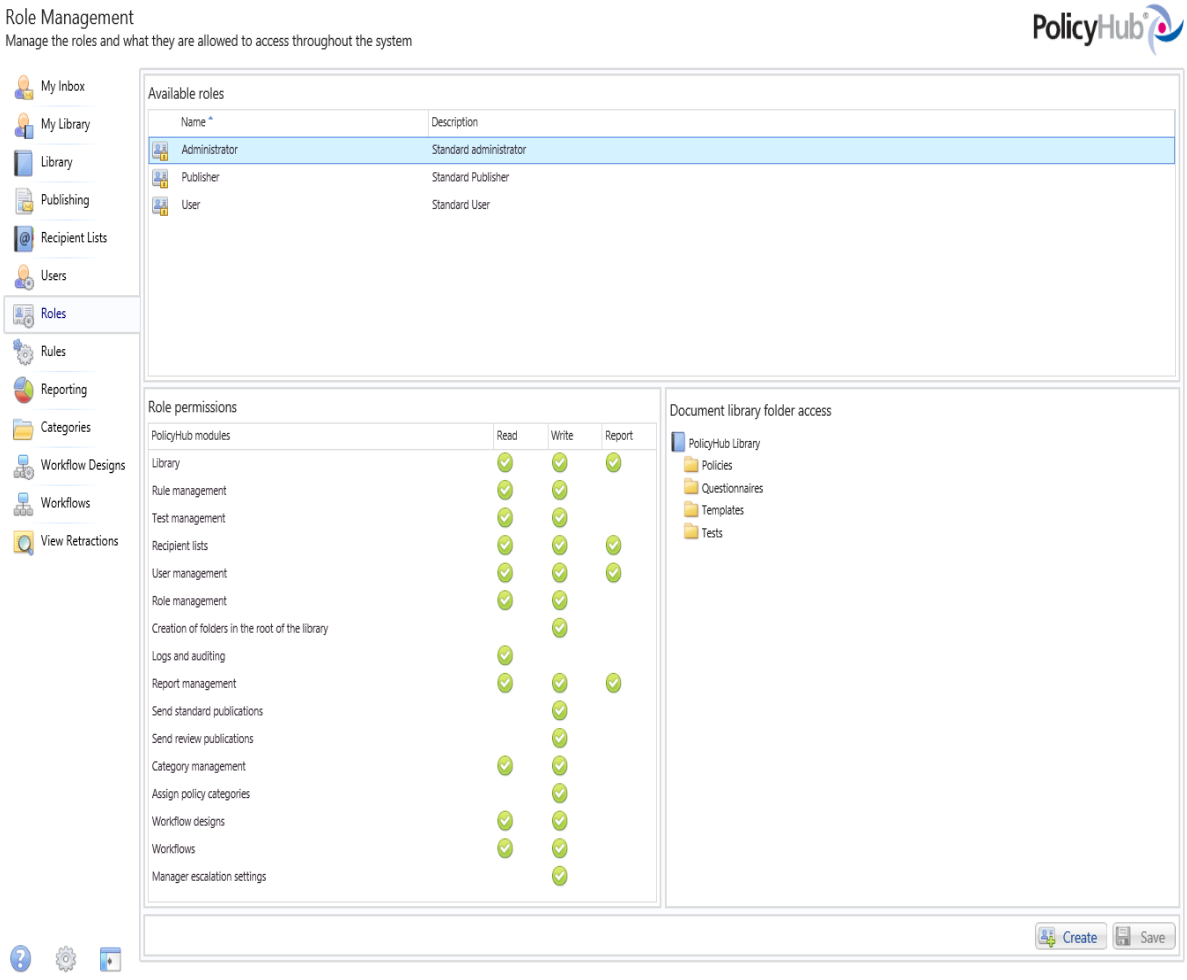
There are two options near the bottom of this page:

- *Show inactive accounts* – When cleared, inactive User accounts are not displayed. When selected, inactive accounts are displayed. Accounts are made active or inactive from within PolicyHub. See “User Menu” on page 338 for information on activating and deactivating User accounts.
- *Show disabled accounts* – When cleared, disabled User accounts are not displayed. When selected, disabled User accounts are displayed. Disabled User accounts have the icon:

Accounts are disabled or enabled externally and cannot be changed from within PolicyHub.

19. Roles

On the *Role Management* page, you can view, create and edit Roles.



19.1. Available Roles

Roles are listed in the *Available roles* pane. Select the Role you want to edit. The *PolicyHub permissions* pane displays the permissions for the selected Role. The *Document library folder access* pane displays the library folder structure. The following information is displayed for each Role:

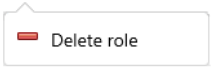
– a system Role. A system Role cannot be deleted and its name and description cannot be edited.

– a user-created Role. This Role can be deleted (if it contains no members) and its name and description can be edited.

Name – the name of the Role. Double-click on the Role name to edit it. Press *Enter* to save the changes and *Cancel* to discard the changes. The name of system Roles cannot be edited.

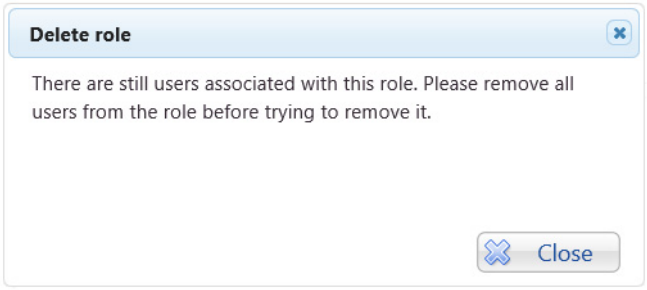
Description – the description given to the Role. Double-click on the description to edit it. Click *Save* to save the changes. A Role description is not optional. The description of system Roles cannot be edited.

Right-click on a Role to display the Role menu.



19.1.1. Delete Role

Select *Delete role* from the menu to delete the selected Role. If the Role still has members, the following dialog is displayed.



You cannot delete the Role until all the members have been moved to a different Role. See "Add Users To The New Role" on page 67 for an example on moving Users from one Role to another.

If the Role has no members, a confirmation dialog is displayed asking you if you are sure you want to delete the Role. Click *Yes* to delete the Role or *No* to cancel the deletion.

Note: This menu option is not available for the default system Roles *Administrator*, *Publisher* and *User* as these Roles cannot be deleted.

A Role *cannot* be deleted if it is associated with a document review schedule. See "Configure Review Schedule or Configure Notification" on page 122 for more information about creating a review schedule.

19.2. PolicyHub Permissions

The *PolicyHub permissions* pane enables changes to the permissions for Roles (when the User belongs to a Role which has *Role management* Write access – see "Role Management" on page 348 for more information).

Note: It is strongly advised to change permissions for Roles when there are no other Users logged in to PolicyHub. If the permissions change for a User while they are logged in to PolicyHub, the change will take effect immediately which could cause problems.

Note: The permissions for the system Role *Administrator* cannot be changed.

19.2.1. Enabling Write And Report Access

Write access cannot be enabled unless *Read* access has already been enabled.

Report access cannot be enabled unless *Read* access has already been enabled.

19.2.2. Disabling Read Access

When a module has *Read* and *Write* access, disabling Read access also disables Write access.

When a module has Read, Write and Report access, disabling Read access also disables Write and Report access.

Note: When a module's permissions are dependent on another module's permissions, disabling Read access in one module can also disable permissions in other modules.

19.2.3. Library

19.2.3.1. Read Access

Enables the Users in the selected Role to:

- see the names of the items in the library.
- view Documents but not edit them.
- view Publications containing those library items.

19.2.3.2. Write Access

Enables the Users in the selected Role to:

- add Documents to the library.
- move Documents, Tests and Questionnaires between folders.
- view and edit Documents.
- copy and delete Publications.
- retract and recall library items and Publications.
- edit the properties (name, description, revision description, version, classifications) of Documents, Tests and Questionnaires.
- manage associated Tests.
- copy hyperlinks.
- create, rename and delete folders.

19.2.3.3. Report Access

Enables the Users in the selected Role to see the report menu for library items and folders.

Note: When the *Library* module has Report access configured and when *Report management* has *Read* access only, the Library *reporting* menus are visible, but the reports are blank.

When the *Library* module has Report access configured and when *Report management* has both *Read and Report* access configured, the library reports can be viewed.

When the *Library* module has Report access configured and when *Report management* has *Read, Write and Report* access configured, the library reports can be viewed and subscriptions can be created.

19.2.4. Rule Management

19.2.4.1. Read Access

Enables the Users in the selected Role to view all the Publication Rules and their message settings.

19.2.4.2. Write Access

Enables the Users in the selected Role to:

- create, copy and delete Publication Rules.
- change message settings on unused Rules.
- change the Active state of Rules.

19.2.5. Test Management

19.2.5.1. Read

Note: *Test management* Read access has no effect unless *Library* Read access is also enabled.

Enables the Users in the selected Role to view Tests and Questionnaires, but not to make any changes.

19.2.5.2. Write

Note: *Test management* Write access has no effect unless *Library* Write access is also enabled.

Enables the Users in the selected Role to:

- create, copy and delete Tests and Questionnaires.
- edit unpublished Tests and Questionnaires.

19.2.6. Recipient Lists

19.2.6.1. Read

Enables the Users in the selected Role to view Recipient Lists, search the Groups and Recipient lists and to download the contents of Recipients Lists to a CSV file.

19.2.6.2. Write

Enables the Users in the selected Role to create, edit and delete Recipient Lists.

19.2.6.3. Report

Enables the Users in the selected Role to view Recipient Lists reports.

Note: When the *Recipient lists* module has Report access configured and when *Report management* is set to *Read* only, the Recipient Lists reporting menus are visible, but the reports are blank.

When the *Recipient lists* module has Report access configured and when *Report management* has both *Read and Report* access configured, the Recipient List reports can be viewed.

When the *Recipient lists* module has Report access configured and when *Report management* has *Read, Write and Report* access configured, the Recipient List reports can be viewed and subscriptions can be created.

Note: Report access can be enabled only when Read access has already been enabled.

19.2.7. User Management

19.2.7.1. Read

Enables the Users in the selected Role to expand the Group tree (on the *User management* page) and to search for Users.

19.2.7.2. Write

Enables the Users in the selected Role to *activate* and *deactivate* Users.

19.2.7.3. Report

Enables the Users in the selected Role to see the report menu for Recipient Lists.

Note: When the *User management* module has Report access configured and when *Report management* is set to *Read* only, the User reporting menus are visible, but the reports are blank.

When the *User management* module has Report access configured, when *Report management* has both *Read and Report* access configured, the User reports can be viewed.

When the *User management* module has Report access configured, when *Report*

management has *Read, Write and Report* access configured, the User reports can be viewed and subscriptions can be created.

Note: Report access can be enabled only when Read access has already been enabled.

19.2.8. Role Management

19.2.8.1. Read

Enables the Users in the selected Role to view the Role management page.

Note: The *Document library folder access* pane will not display the library folders unless the appropriate library access has been configured. See "Library" on page 345 for more information.

19.2.8.2. Write

Enables the Users in the selected Role to create and edit Roles and to change the permissions for all Role (except the *Administrator* Role).

Note: The *Document library folder access* pane will not display the library folders unless the appropriate library access has been configured. See "Library" on page 345 for more information.

19.2.9. Creation Of Folders In The Root Of The Library

19.2.9.1. Write Access

Enables the Users in the selected Role to right-click on the *PolicyHub Library* and select *Add folder* from the menu. This option also enables Users to move folders in the library.

Note: Write access cannot be enabled unless *Library* Read and Write access have already been enabled.

19.2.10. Logs And Auditing

19.2.10.1. Read

Enables the Users in the selected Role to view and search the list of retracted and recalled items.

19.2.11. Report Management

19.2.11.1. Read

Enables the Users in the selected Role to view the list of report subscriptions. However, Users cannot view the subscriptions in the list.

19.2.11.2. Write

When Report access is *also* configured, Write access enables the Users in the selected Role to view reports for *modules* which have *Report* access enabled and to view existing report subscriptions and create new report subscriptions.

Note: The User will not be able to view the actual report being sent in the subscription unless the User has the Report option for the appropriate module.

19.2.11.3. Report

Enables the Users in the selected Role to view reports for *modules* which have *Report* access enabled and view existing report subscriptions.

Note: The User will not be able to view the actual report being sent in the subscription unless the User has the Report option for the appropriate module.

19.2.12. Send Standard Publications

19.2.12.1. Write

Note: *Send Standard Publication* Write access can be enabled only when *Library* Read access has already been enabled.

Enables the Users in the selected Role to send Publications.

19.2.13. Send Review Publications

19.2.13.1. Write

Note: *Send Review Publication* Write access can be enabled only when *Library* Read access has already been enabled.

Enables the Users in the selected Role to send Review Publications.

19.2.14. Category Management

Enables the Users in the selected Role to *Read* and *Write* from the *Navigation* menu. By default, the *Read* and *Write* permissions are active in a new Role.

If the *Read* and *Write* permissions are not active, the *Navigation* menu will not be operative for the selected role.

19.2.14.1. Read

Enables the Users in the selected Role to *Read* the *Navigation* menu.

Note: *Read* access can be enabled without *Write* access.

19.2.14.2. Write

Enables the Users in the selected Role to *Write* to the *Navigation* menu.

Note: *Write* access cannot be enabled unless *Read* access has been enabled first.

19.2.15. Assign Policy Categories

19.2.15.1. Write

Enables the Users in the selected Role to *Manage Categories* in the *Library* menu.

Note: Write permission is dependent on the read permission associated with Category Management.

19.2.16. Workflow Designs

19.2.16.1. Read

Enables the Users in the selected Role to view the Workflow designs page.

Note: *Read* access can be enabled without *Write* access.

19.2.16.2. Write

Enables the Users in the selected Role to create, edit and delete Workflow designs.

Note: *Write* access cannot be enabled unless *Read* access has been enabled first.

19.2.17. Workflows

19.2.17.1. Read

Enables the Users in the selected Role to view the Workflows page.

Note: *Read* access can be enabled without *Write* access.

19.2.17.2. Write

Enables the Users in the selected Role to Restart or Cancel an instance in the Workflows page.

Note: *Write* access cannot be enabled unless *Read* access has been enabled first.

19.2.18. Manager Escalation Settings

19.2.18.1. Write

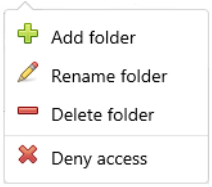
Enables the Users in the selected Role to include or exclude non-compliant publication users in *Manager escalation emails*, see “Escalation emails” on page 241 for further details.

Note: Depending on your PolicyHub licence, the *Manager escalation settings* option may not be available in your application software.

19.3. Document Library Folder Access

The library folder structure can be changed by dragging and dropping folders if you have *Library* Write permission.

Right-click on a folder to display the folder access menu.



19.3.1. Add Folder

This option adds a folder to the PolicyHub library. See “Add Folder” on page 94 for details.

19.3.2. Rename Folder

This option renames the selected folder in the PolicyHub library. See “Rename Folder” on page 94 for details.

19.3.3. Delete Folder

This option deletes the selected folder from the PolicyHub library. See “Delete Folder” on page 95 for details.

19.3.4. Allow Access

Select *Allow access* to allow the members of the selected Role to have access to the selected folder and sub-folders.

A yellow folder icon indicates the members of the currently selected Role have access to that folder.

19.3.5. Deny Access

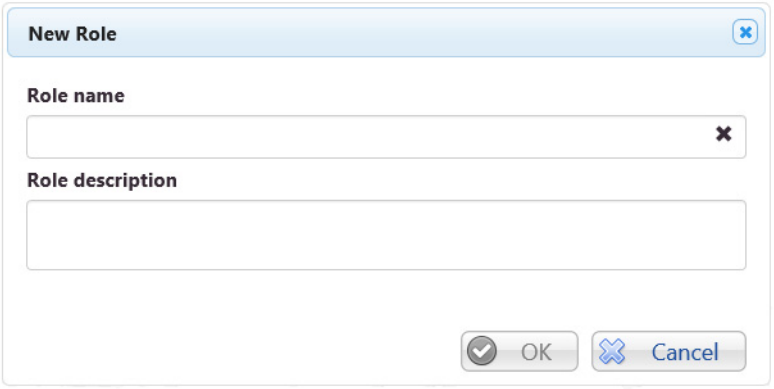
Select *Deny access* to prevent the members of the selected Role to be able to see the folder in the library. When access to a folder is *denied*, the access to all sub-folders is also *denied*.

A grey folder icon indicates the members of the currently selected Role cannot see that folder in the library.

19.4. Buttons

19.4.1. Create

Click the *Create* button to create a new Role. The *New Role* dialog is displayed.



Enter the name of the new Role in the *Role name* box. If required, enter a description in the *Role description* box. Press *OK* to save the Role or *Cancel* to close the dialog without saving the new Role.

By default, all the permissions are selected for a new Role. Edit the permissions and save the Role. See “PolicyHub Permissions” on page 344 for more information on permissions.

It is possible to limit the folders members of this Role can see. See “Document Library Folder Access” on page 351 for more information on denying access to folders.

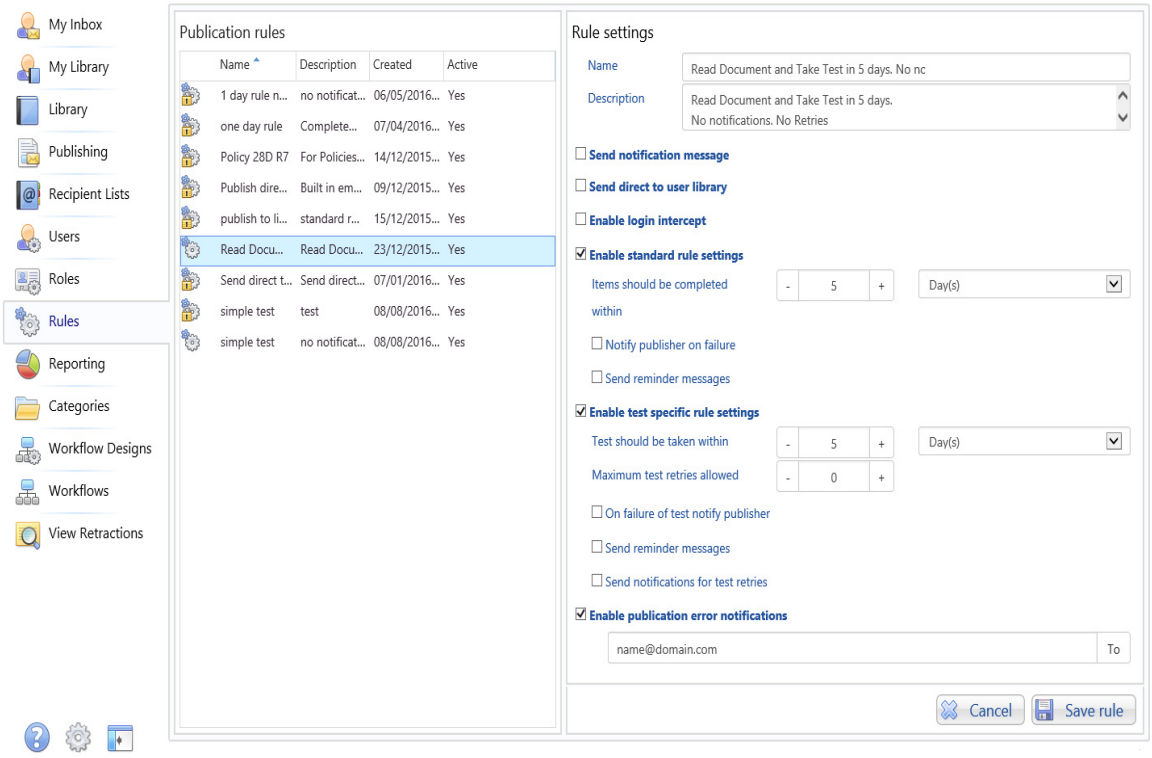
19.4.2. Save

Click the *Save* button to save the changes made on the Role management page.

On the *User Roles Management* page, select a *Role* from the list of *Available roles*, then click each privilege you want to be allowed/denied to the selected role.

20. Rules

Rules control how emails are sent, the time-span within which documents must be read and the criteria by which *Questionnaires* and *Tests* are measured.



On the *Rules Management* page, you can create, copy, delete, activate and deactivate rules.

20.1. Publication Rules

The rules are listed. Rules can be sorted by clicking on the column titles *Name*, *Description*, *Created* or *Active.*

Tick boxes and PolicyHub specific terms, used in this section, are explained in Table 85.

TABLE 85. Publication Rules

Term	Meaning / Description
Type	– indicates the rule has not yet been used and is therefore unlocked. This means it can be edited or deleted as well as being activated or deactivated. – indicates the rule has been used and cannot be edited or deleted. However, it can be activated and deactivated.
Name	The name given to the rule.
Description	The description given to the rule.

TABLE 85. Publication Rules

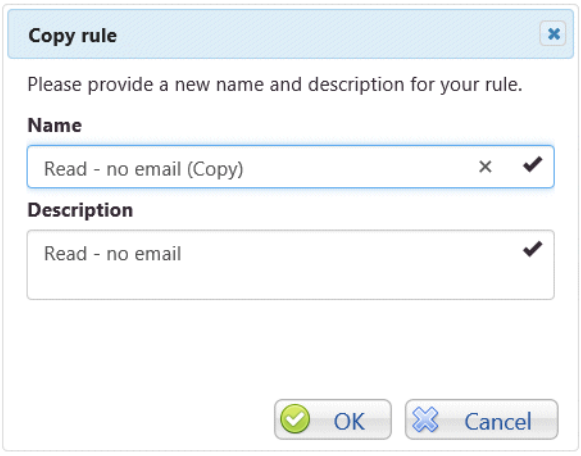
Term	Meaning / Description
Created	The date the rule was first saved.
Active	*Yes* – the rule is active and can be used in new Publications. *No* – the rule has been deactivated and cannot be used in Publications until it has been activated. See "Activate/Deactivate Rule" on page 356 for information about activating and deactivating a rule.

20.2. Publication Rules Menu

Right-click on a rule in the *Publications rule* list to display the rules menu.

20.2.1. Copy Rule

Select *Copy rule* to create a new rule based on the selected rule. The new rule has the same name as the rule it is based on with *(Copy)* appended. The *Copy rule* dialog is displayed.



The tick marks indicate the field has valid text. An X indicates the field is empty and the copy cannot be completed until text has been entered.

20.2.2. Delete Rule

Note: If a rule has been used, the *Delete rule* option will not be active and you will not be allowed to delete the rule.

A rule with this icon has not been used and *can* be deleted by selecting the rule and selecting *Delete rule* from the menu.

However, a rule with the icon shown below has been used and *cannot* be deleted:

It can, however, be deactivated which prevents it being used for future publications. See "Activate/Deactivate Rule" on page 356.

To delete a rule, right-click on the rule and select *Delete rule* from the menu.

A dialog is displayed asking if you are sure you want to delete this rule. Click *Yes* to delete the rule or *No* to close the dialog without deleting the rule.

20.2.3. Activate/Deactivate Rule

Rules are *Active* by default. This means they appear in the *Publication rule* drop-down list on the *Build New Publication* page. To prevent a rule from appearing in the *Publication rule* drop-down list, *deactivate* it. Right-click on the rule and select *Deactivate rule* from the menu.

A dialog is displayed asking if you are sure you want to deactivate this rule. Click *Yes* to deactivate the rule or *No* to close the dialog without deactivating the rule.

To activate a deactivated rule, right-click on the deactivated rule and select *Activate rule* from the menu. A dialog is displayed asking if you are sure you want to activate this rule. Click *Yes* to activate the rule or *No* to close the dialog without activating the rule.

The *Active* column indicates whether a rule is active. See "Active" on page 355 for more information.

20.3. Rule Settings

Tick boxes and PolicyHub specific terms, used in this section, are explained in Table 86.

TABLE 86. Rule Settings

Term	Meaning / Description
Name	The name given to the rule.
Description	The description given to the rule.
Send notification message	When selected, an email message is sent to each recipient of a Publication which is sent using this rule, notifying them they have a new Compliance Request in their PolicyHub inbox. When cleared, recipients of a Publication which is sent using this rule, are not sent a notification email.
Add text to the notification message	Select this option to add more text to the notification message which is sent to recipients of a Publication which is sent using this rule. Enter the required text in the text box. Clear this option to send the standard notification message only, with no added text. **Note:** This option is available only when the option *Send notification message* is selected.

TABLE 86. Rule Settings

Term	Meaning / Description
Send direct to user library	This option publishes documents directly to the user library. With this selected *Send notification message* and *Enable publication error notifications* are active but the *Login intercept, Standard rule settings* and *Test specific rule settings* are inactive.
Login intercept settings	
Enable login intercept	When selected, the *Login intercept* rule settings are activated.
User must complete documents	*After publication due date* – the deferrals configured via the option *Allow user to defer for an extra* start after the publication due date. *Immediately* – the deferrals configured via the option *Allow user to defer for an extra* start immediately.
Login intercept will start	Determines whether *Login Intercept* will start. *After publication due date – Login Intercept* will start after the publication due date. *Immediately – Login Intercept* will start immediately.
Allow user to defer for an extra	Sets the number of days *or* the number of login deferrals allowed either: from the date the publication is received by the recipients (when *User must complete documents* is set to *Immediately*) or after the *publication due date* (when *User must complete documents* is set to *After the publication due date*). Once this limit has been reached, the User will not be able to complete a login to their Windows session until the document has been completed.
Standard rule settings	
Enable standard rule settings	When selected, the rule settings which are used with Documents and Questionnaires are activated.
Items should be completed within	Sets the time-span within which *Documents* must be read and *Questionnaires* must be returned.
Notify publisher on failure	When *selected*, when a User fails to confirm a document as read within the allotted time, that User is logged as non-complied and the publisher is notified via email. When *cleared,* when a User fails to confirm a document as read within the allotted time, that User is logged as non-complied but the publisher is not notified.

TABLE 86. Rule Settings

Term	Meaning / Description
Send reminder messages	When *selected*, an email message is sent to each recipient of a Publication which is sent using this rule, who have not yet confirmed a document as read or returned a Questionnaire reminding them of the outstanding items. When *cleared*, recipients of a Publication which is sent using this rule, are not sent a reminder email for outstanding Documents and Questionnaires.
Reminder frequency	Determines how often reminder emails are sent to a User who has not yet read the document. No reminder messages will be sent out after the publication due date. **Note:** This option is available only when the option *Send reminder messages* is selected.
Add text to all reminder messages	Select this option to add more text to the reminder message which is sent to recipients of a Publication which is sent using this rule for Documents and Questionnaires which have not yet been completed. Enter the required text in the text box. Clear this option to send the standard reminder message only, with no added text. **Note:** This option is available only when the option *Send reminder messages* is selected.
Add text to the first reminder message	Select this option to add text to the first reminder message. Enter the required text in the text box. **Note:** This option is available only when the option *Use different text for the second and subsequent reminder messages* is selected.
Use different text for the second and subsequent reminder messages	When selected, this option will add different text to the second and subsequent reminder messages. Enter the required text in the text box. Clear this option to send the same text in all reminder messages. When this is selected, the next option *Use different text for the third and subsequent messages* becomes available. This functionality repeats for each subsequent selection providing the reminder frequency does not exceed the time-span that *Documents* must be read.

TABLE 86. Rule Settings

Term	Meaning / Description
Test rule settings	
Enable test specific rule settings	When selected, the rule settings which are used with Tests are activated.
Test should be taken within	Sets the time-span within which Tests must be completed.
Maximum test retries allowed	Sets the maximum number of times each User can re-take the Test after failing it.
On failure of test notify publisher	When *selected,* when a User fails all test attempts that User is logged as non-complied and the publisher is notified via email. When *cleared,* when a User fails all test attempts that User is logged as non-complied but the publisher is not notified.
Send reminder messages	Activates the reminder frequency function.
Reminder frequency	Determines how often *Test* reminder emails are sent.
Add text to all reminder messages	Select this option to add more text to the reminder message which is sent to recipients of a Publication which is sent using this rule for Tests which have not yet been taken. Enter the required text in the text box. Clear this option to send the Test reminder message only, with no added text. **Note:** This option is available only when the option *Send reminder messages* is selected.
Add text to the first reminder message	Select this option to add text to the first reminder message. Enter the required text in the text box. **Note:** This option is available only when the option *Use different text for the second and subsequent reminder messages* is selected.
Use different text for the second and subsequent reminder messages	When selected, this option will add different text to the second and subsequent reminder messages. Enter the required text in the text box. Clear this option to send the same text in all reminder messages. When this is selected, the next option *Use different text for the third and subsequent messages* becomes available. This functionality repeats for each subsequent selection providing the reminder frequency does not exceed the time-span that *Tests* must be taken.

TABLE 86. Rule Settings

Term	Meaning / Description
Send notifications for test retries	When *selected*, an email message is sent to each recipient of a Publication sent with this rule, who have failed the Test but who still have Test retry attempts remaining. When *cleared*, recipients of a Publication which is sent using this rule, are not sent an email when they are allowed to re-take the Test.
Add text to the retry test message	Select this option to add more text to the message which is sent to recipients of a Publication who have failed the Test but who have one or more retry attempts remaining. Clear this option to send the Test retry message only, with no added text. **Note:** This option is available only when the option *Send notifications for test retries* is selected.
Enable publication error notifications	When this option is *cleared*, if there is an error with a Publication using this rule, the *Status* is set to *Error.* When this option is *selected*, if there is an error with a Publication using this rule, one or more Users will be notified with an email. Click the *To* button, select the required User and drag the name to the right-hand pane. Repeat with other Users, if required. When you have selected the required Users, click *Use list of recipients* to add the selected recipients to the *To* list (or click *Close* to close the dialog without adding any more Users to the *To* list). Users can be deleted from the *To* list by selecting the User's email address from the list and deleting it.

20.4. Create New Rule

Click the *Create new rule* button to create a new rule.

20.5. Adding Text To Emails

Note: Text that has been added to a message *cannot* be changed or deleted after it has been sent. If a rule with appended email messages is to be re-used: Copy it, rename it, then add, edit or delete any added text.

20.5.1. Notification Message

The standard notification email message which is sent to recipients of a Publication can be customised during the installation. Text which is added to the Notification Message is displayed below the standard message.

20.5.2. Standard Reminder Message

The standard email reminder message which is sent to recipients of a Publication can be customised during the installation. Text which is added to the Standard Reminder Message is displayed below the standard message.

20.5.3. Test Reminder Message

The Test email Reminder message which is sent to recipients of a Publication can be customised during the installation. Text which is added to the Test Reminder Message is displayed below the standard message.

20.5.4. Retry Test Message

The retry Test email message which is sent to recipients of a Publication can be customised during the installation. Text which is added to the Retry Test Message is displayed below the standard message.

20.6. Cancel

Click *Cancel* to discard any changes you have made.

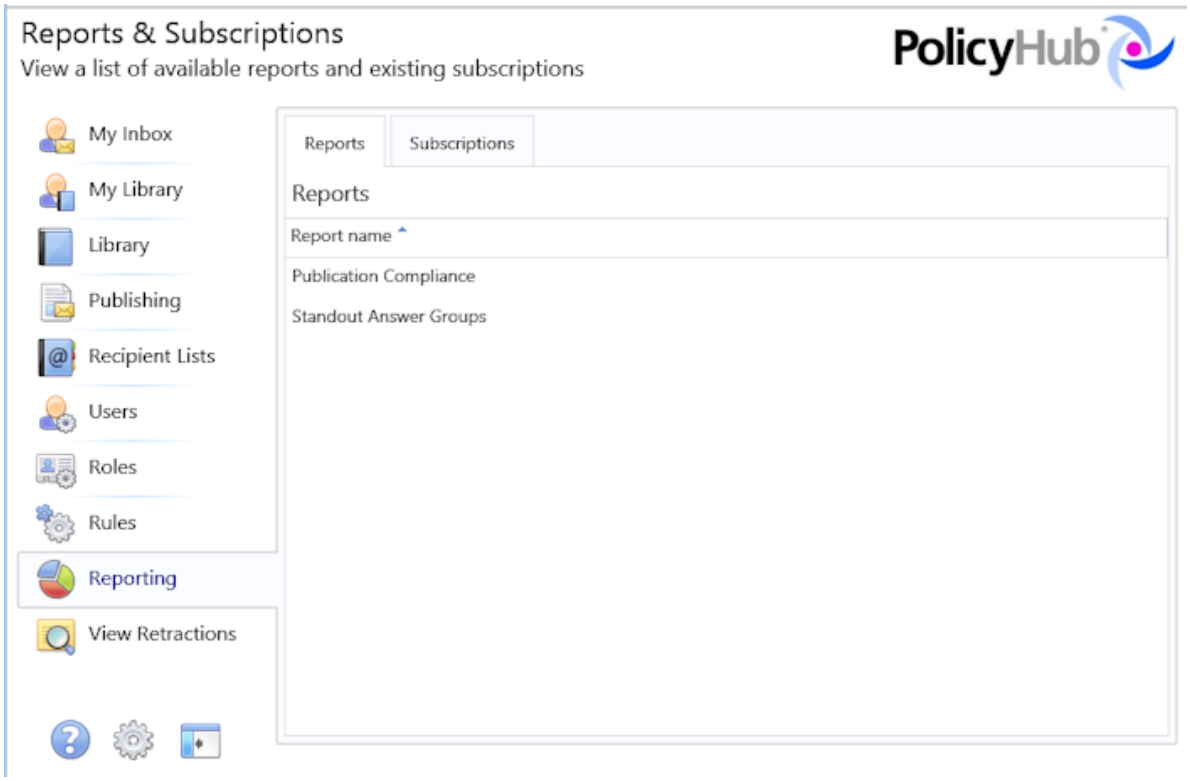
20.7. Save Rule

Click the *Save rule* button to save the changes made to an existing rule or to save the options configured for a new rule.

21. Reporting

Reporting enables you to view *Compliance* reports and *Standout Answer* reports. It also enables you to view, edit, create and delete subscriptions.

Subscriptions enables you to create reports at scheduled times. These reports can then be emailed to a distribution list or saved on a File Share where Users can view them.



21.1. Reports & Subscriptions

On the *Reporting* page, you can select and view *Publication Compliance* reports which have default filter settings already enabled. Additionally, above each report you can select different report *filters* and *fields*. For more information, see “Changing the Default Filtering Option” on page 373 and “Adding/Removing Columns From Reports” on page 376.

The *Reports* tab allows you to see *Publication Compliance* reports or *Standout Answer Groups* reports. When the report data is found (by default; for *today* and the *previous seven days*), data is displayed in the main report window on the right-hand side.

To view report statistics for a different time period, you can change the report’s *Date From* and *Date To* filter settings. See “Publication Compliance Report” on page 364 for more information.

To view report statistics for Standout Answer Groups. See “Standout Answer Groups Report” on page 368 for more information.

To investigate a specific publication’s compliance status in more detail, click on any of its active links (underlined text) in the report’s table.

The *Subscriptions* tab allows you to view existing subscriptions for the reports. All current subscriptions will be listed below by *Report name*, *Subscription name*, *Owner* and *Last executed* date. See “Sorting Report Data Within Columns” on page 376 for more information.

21.2. Report Toolbar

Reports can be *Printed*. Click the *Print* button to open the Windows print dialog.

For more information, see “Printing Reports” on page 363 below.

Reports can also be *Exported*. Click the *Export* button.

For more information, See see “Exporting Reports” on page 364 below.

If you need to *Filter* the results returned by a report, click the *Filter* tab and, from the available filter options, select your requirements.

For more information about adding and or changing filtering options, see “Date Filters” on page 371, “Additional Filtering Options” on page 372 and “Changing the Default Filtering Option” on page 373.

If you need to change the *Column Headings* which are displayed, or the order in which the current headings are displayed, click the *Fields* tab and, from the available field options, select your requirements.

For more information see “Adding/Removing Columns From Reports” on page 376.

When you have clicked on an active link in a report and now want to return to the parent report, click the *Close* button below the displayed report.

21.2.1. Printing Reports

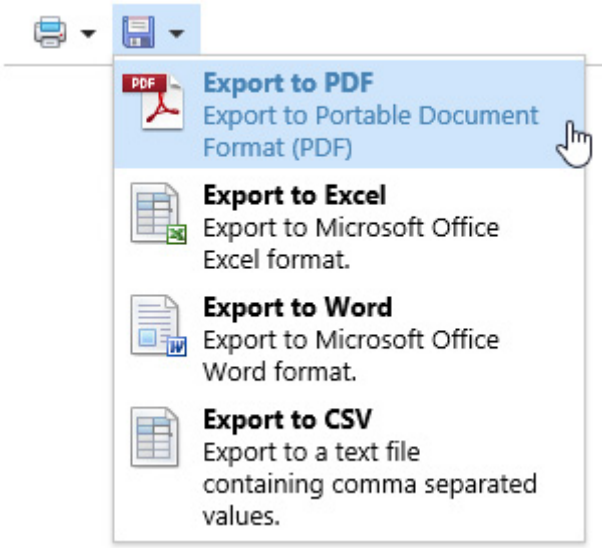
Click the *Print* button to open the report in a new browser window and display the *Print* dialog.

Select your printer, set its particular print settings and print the report.

When the report has been printed, close the browser window to return to the original PolicyHub window.

21.2.2. Exporting Reports

The *Export* button allows you to export the report. When the *Export* button is clicked, a drop-down menu enables the User to select how the report will be exported.



PDF – the report data is exported to PDF format and is displayed in Adobe Reader.

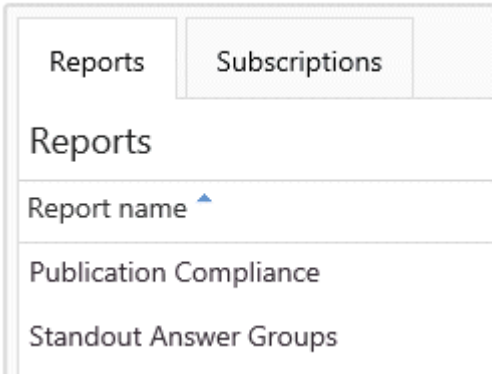
Excel – the report and data are exported to, and displayed in, Excel.

Word – the report data is exported to, and displayed in Word.

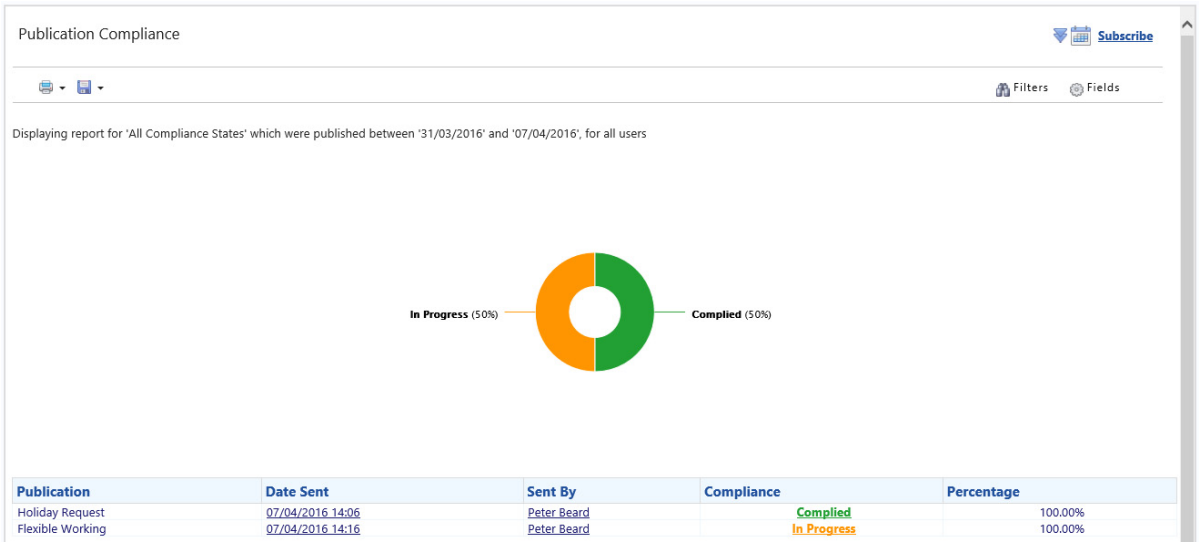
CSV (comma delimited) – the report data is exported to CSV format and is displayed in Excel.

21.3. Publication Compliance Report

On the *Reporting* page, select *Publication Compliance*.

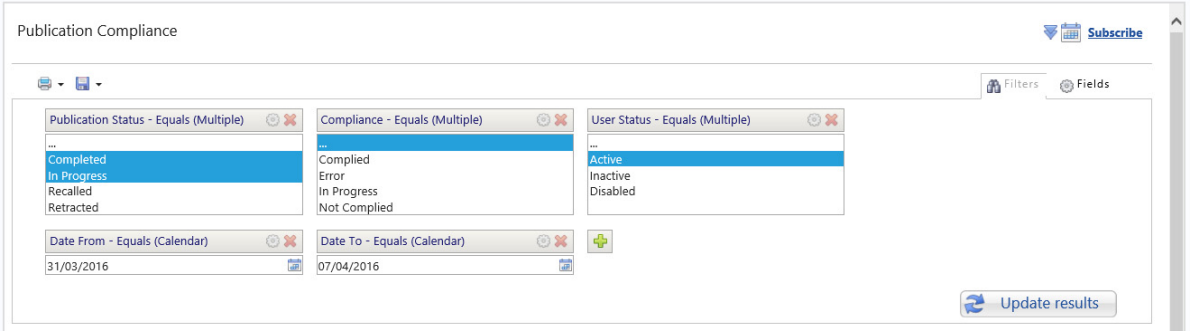


By default, the *Publication Compliance* report displays results for all *Completed* Publications (which have *Complied,* and or are in *Error* and or *Not complied*, for all *Active Users*) which were sent in the last week.



To change the above mentioned default *Publication Status, Compliance Status, User Status* and or the *Date Range* reported on, click *Filters*.

The report's filter options are displayed above the report's graph.



From the report's *Publication Status* filter, you can change the default setting to the Recalled and or Retracted options and, by selecting the ellipsis symbol (...) you can choose to report on all of the available options.

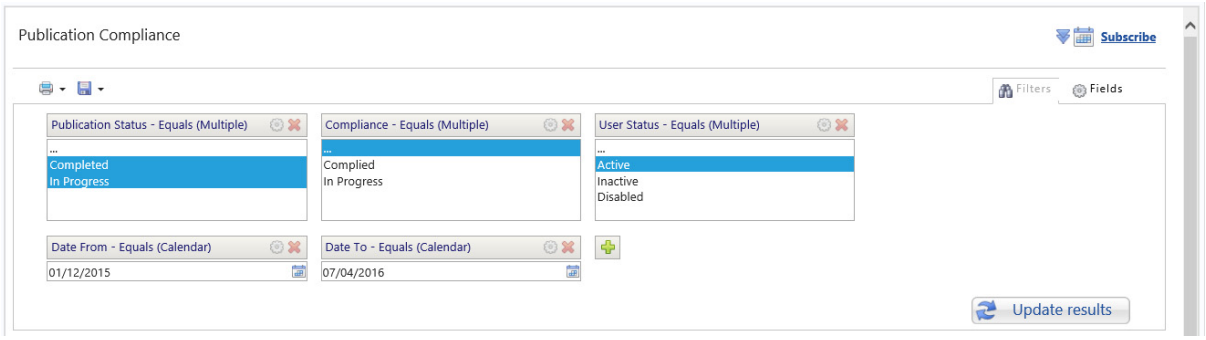
From the report's *Compliance Status* filter, you can change the default ellipsis symbol (...) option setting to the Complied, Error, In Progress and or Not Complied reporting options.

From the report's *User Status* filter, you can change the default *Active* setting to the Inactive and or Disabled user options and, by selecting the ellipsis symbol (...) you can choose to report on all of the available options.

To change the default *Date From* and *Date To* options, you can select different dates from each Date filters' drop-down Calendar.

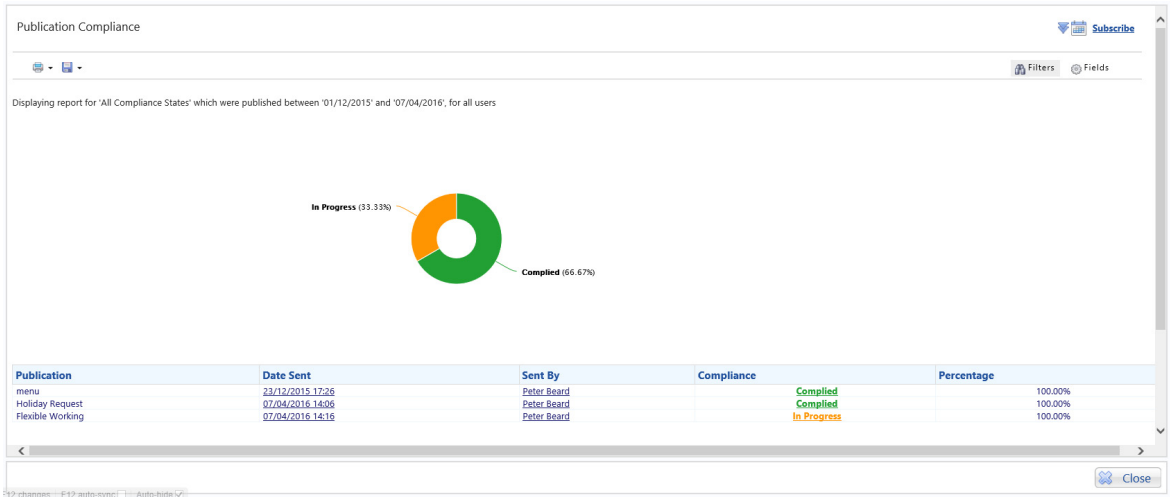
Note: The *Date From* value should always be earlier than the *Date To* value.

For more information about adding and or changing filtering options, see “Date Filters” on page 371, “Additional Filtering Options” on page 372 and “Changing the Default Filtering Option” on page 373.

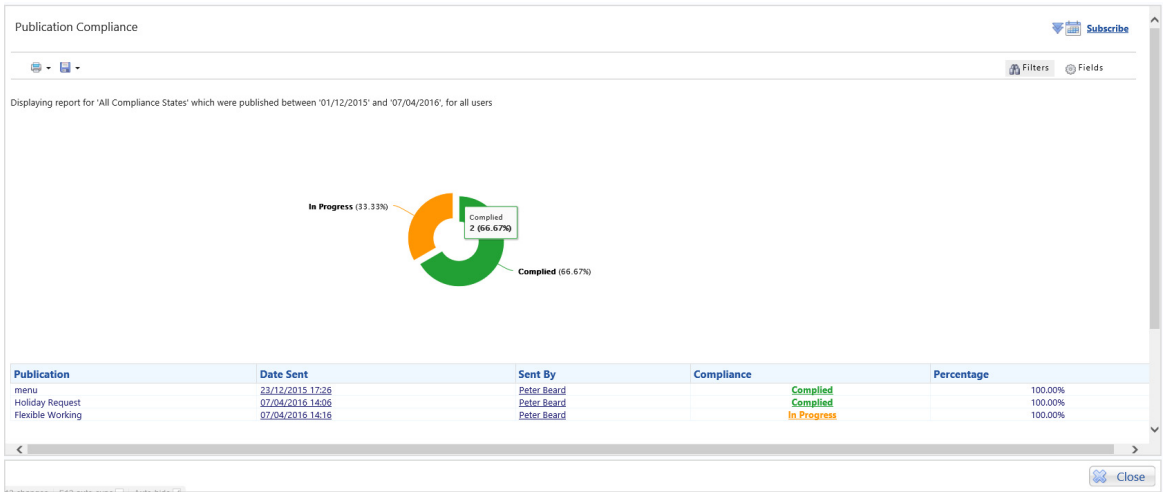


The above example shows the *Publication* filter set to *Completed*, the *Compliance* filter set to *Complied* and *Not Complied*, the *User Status* filter set to *Active* and finally, the *Date From* and *Date To* filters set to *1st September 2015* and *26th October 2015*, respectively.

The report data for the changed filter settings (described above) are shown below.



You can move the mouse cursor over a segment of the chart to display the compliance status statistics for that segment.



To investigate a specific publication's compliance status in more detail, click on any of its active links (underlined text) in the report. The column headings in the above report are described in Table 87.

TABLE 87. Publication Compliance Report

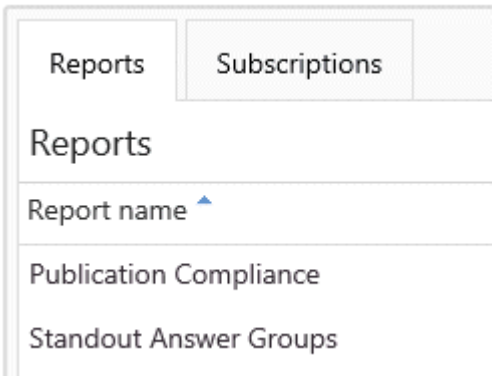
Item	Description
Publication	The name of the Publication with which this version of the library item was published.
Date Sent	The date the Publication was sent. Active Link. Click on a date to display the *Publication Compliance* report for all Publications sent on that date.
Sent By	The name of the person who sent the Publication. Active Link. Click on a name to display the *Publication Compliance* report for all Publications sent by the selected user.
Compliance	The compliance status (Complied, In Progress, Not Complied or in Error) of the Publication. Active Link. When the Compliance Status is clicked, the *Item Compliance* report is displayed for the selected Publication and the selected Compliance Status. See "Reporting" on page 113 for more information.
Percentage	The percentage of recipients of the Publication with the compliance status shown.
Publication Status (Hidden by default)	Publications have the status *Completed* when: • They have been complied with by all recipients. • The rule used for Publication has expired. • They were Published directly into user library. Publications are *Active* when there are still some outstanding publications to be complied with and the rule has not expired. Publications have the status *Error* when they weren't sent because of an error. Publications have the status *Retracted* when the Publication was *Retracted*. Publications have the status *Recalled* when the Publication was *Recalled*.

For more information about column headings in reports, see "Adding/Removing Columns From Reports" on page 376.

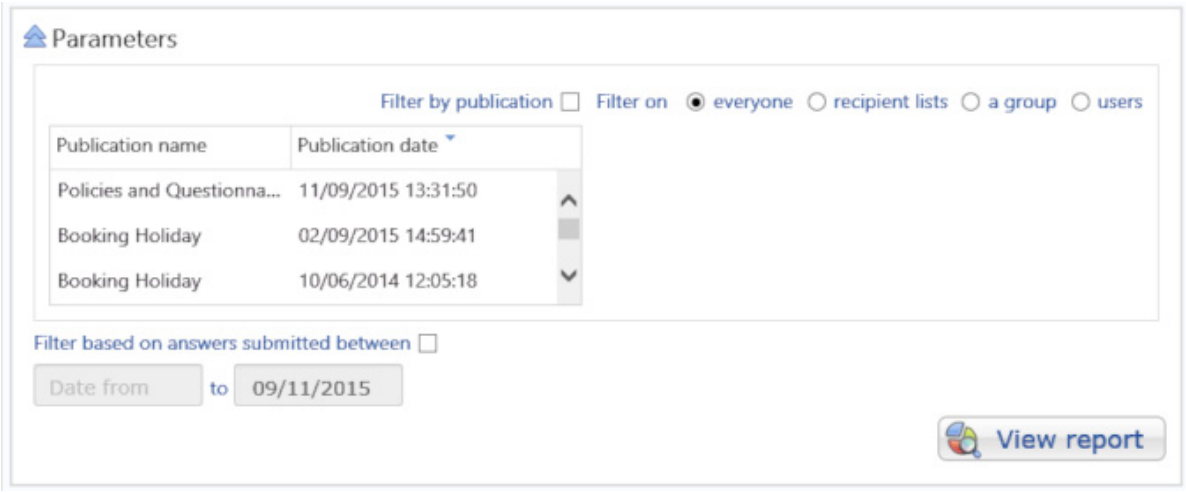
21.4. Standout Answer Groups Report

This section describes how to view *Questionnaire* standout answer reports by *Standout Answer Groups*. From the menu on the left, select *Reporting*.

On the *Reporting* page, from under the *Reports* tab, select *Standout Answer Groups*.



In the Summary Report's *Parameters* section, you can filter by Publication, Date (from when the Questionnaire was sent), Everyone, Recipient Lists, Group and User.



Additionally, you can select the *Filter based on answers submitted between* tick box and enter the *From* and *To* dates, as required.

This report shows a graph of the number of replies belonging to each Standout Answer Group.

The column headings in the above report are described in Table 88.

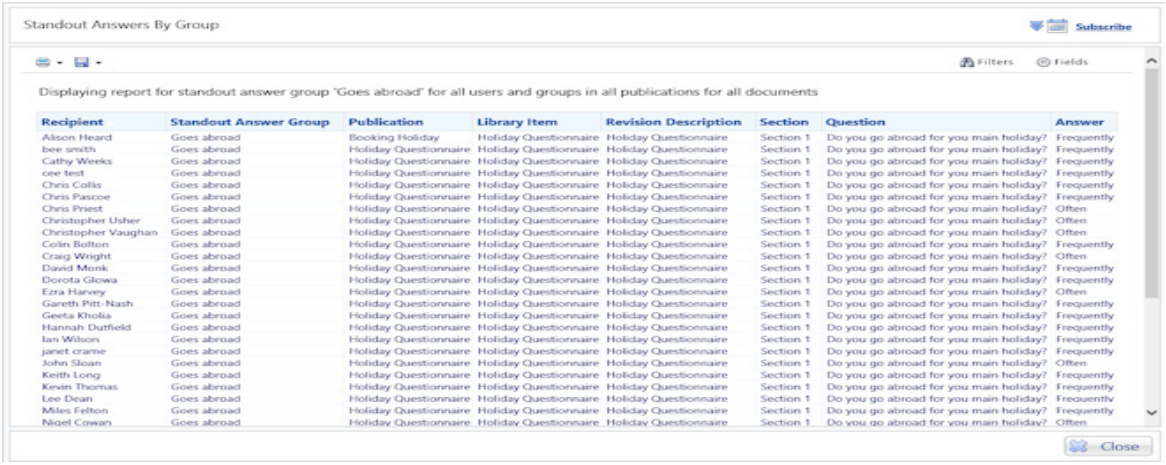
TABLE 88. Standout Answers Report

Item	Description
Standout Answer Group	The name of the Standout Answer Group. Active Link. Click on a Standout Answer Group name to display the *Standout Answers By Groups* report for the selected Standout Answer Group. See "Standout Answers By Group Report" below for more information.
Submission Count	The number of times an answer belonging to the Standout Answer Group was given.
Last Submitted	The date and time an answer belonging to the Standout Answer Group was submitted.

21.4.1. Standout Answers By Group Report

A *Standout Answers By Group* report is displayed by viewing the Standout Answer report and clicking on a *Standout Answer Group's* name.

This report shows the users who selected an answer belonging to the selected Standout Answer Group.



The column headings in the above report are described in Table 89.

Reports can be filtered by selecting various options. The available filters differ for each report.

Note: Filters are applied to refine the selected report and are not used to change what the report is reporting on.
For example, a report displaying the names of all of the recipients who received a publication in September could be filtered to display only the names of those recipients who received the publication between the 10th and the 20th of September.

TABLE 89. Standout Answers By Group Report

Item	Description
Recipient	The name of the user who entered or selected the Questionnaire answer which belongs to the selected Standout Answer Group. Active Link. Click on a Recipient to display a *Standout Answers By Group* report for a selected Recipient.
Standout Answer Group	The name of the Standout Answer Group used in the Questionnaire. Active Link. Click on a Standout Answer Group to display a *Standout Answer By Group* report for the selected Standout Answer Group.
Publication	The name of the Publication used to send the Questionnaire which contained the Standout Answer. Active Link. Click on a Publication to display a *Standout Answer By Group* report for the selected Publication.

TABLE 89. Standout Answers By Group Report

Item	Description
Library Item	The name of the Questionnaire which contained the Standout Answer. Active Link. Click on a Library Item to display a *Standout Answer By Group* report for the selected Library Item.
Revision Description	The description of the selected revision of the Questionnaire which contained the Standout Answer. Active Link. Click on a Revision Description to display a *Standout Answers By Group* report for the selected Revision Description.
Section	The name of the Section in the Questionnaire which contained the Standout Answer. Active Link. Click on a Section to display a *Standout Answers By Group* report for the selected Section.
Question	The Question in the Section of the Questionnaire which contained the Standout Answer. Active Link. Click on a Question to display a *Standout Answers By Group* report for the selected Question.
Answer	The answer the selected user entered or chose which was part of the selected Standout Answer Group. Active Link. Click on an Answer to display a *Standout Answers By Group* report for the selected Answer.
Last Submitted (Hidden by default)	The date and time an answer belonging to the Standout Answer Group was submitted.
Usage Count (Hidden by default)	The number of times the questionnaire was published to each user.

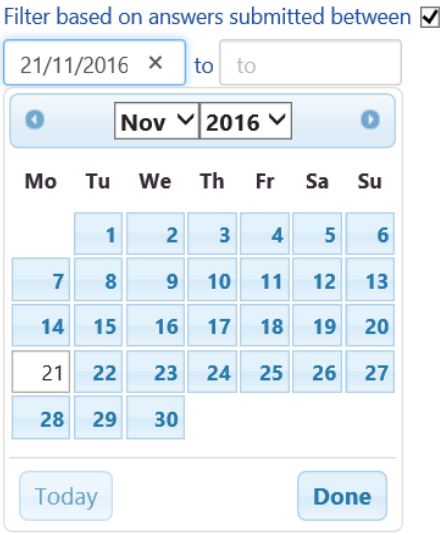
For more information about column headings in reports, see “Adding/Removing Columns From Reports” on page 376.

21.4.2. Date Filters

Date filtering is the default filtering option for the *Standout Answer By Group* report.

Dates can either be typed in, or selected from the drop-down calendar.

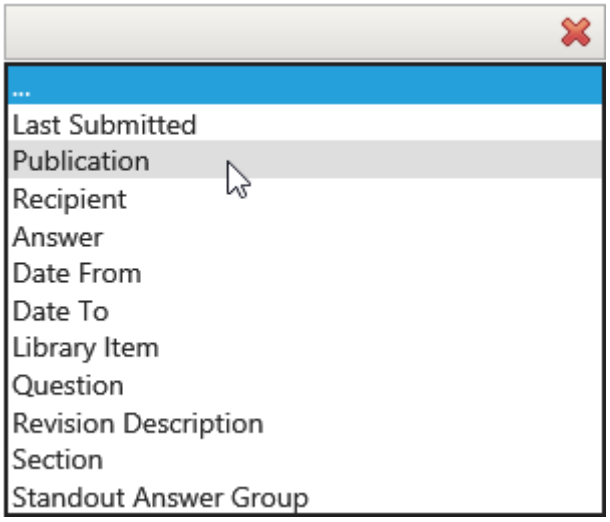
Note: The *Date From* value should always be earlier than the *Date To* value.



After you have entered the required *Date From* and *Dated To* options, click *View report* to display the filtered report.

21.4.3. Additional Filtering Options

The following additional *Standout Answers By Group* Filter options are also available.

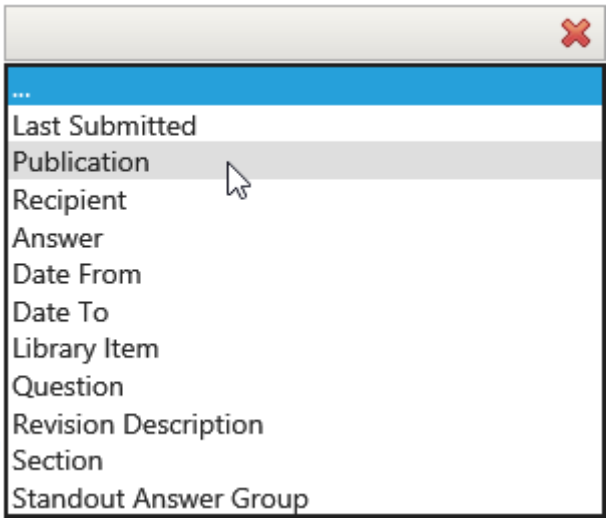


21.4.3.1. Filtering By Publication Example

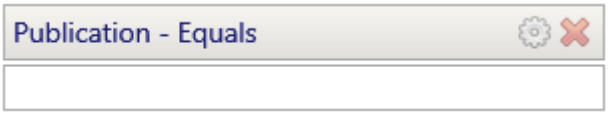
Click the *Filters* tab,

then click the *Add filter* icon.

From the filter's drop-down list, select *Publication*, to add the Publication Filter option.



Enter the publication's name that you want to filter on,



then click *Update results* to display the filtered report.

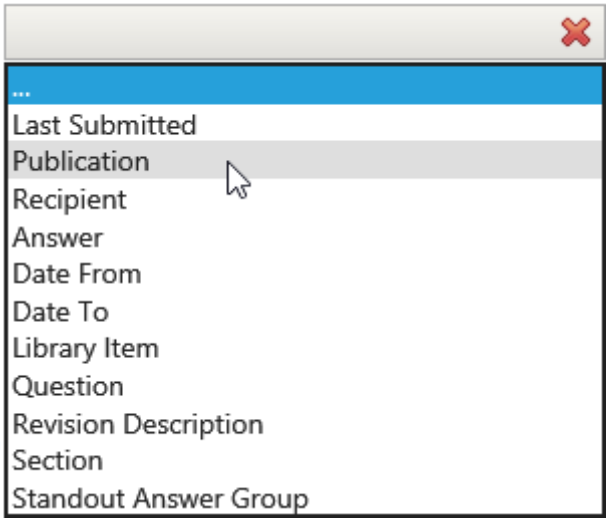
If the default filtering option (in this example, *Publication Equals*) is not your required option, see "Changing the Default Filtering Option" below.

21.4.4. Changing the Default Filtering Option

To access the filter options for any *Standout Answers By Group* report, click the *Filters tab,*

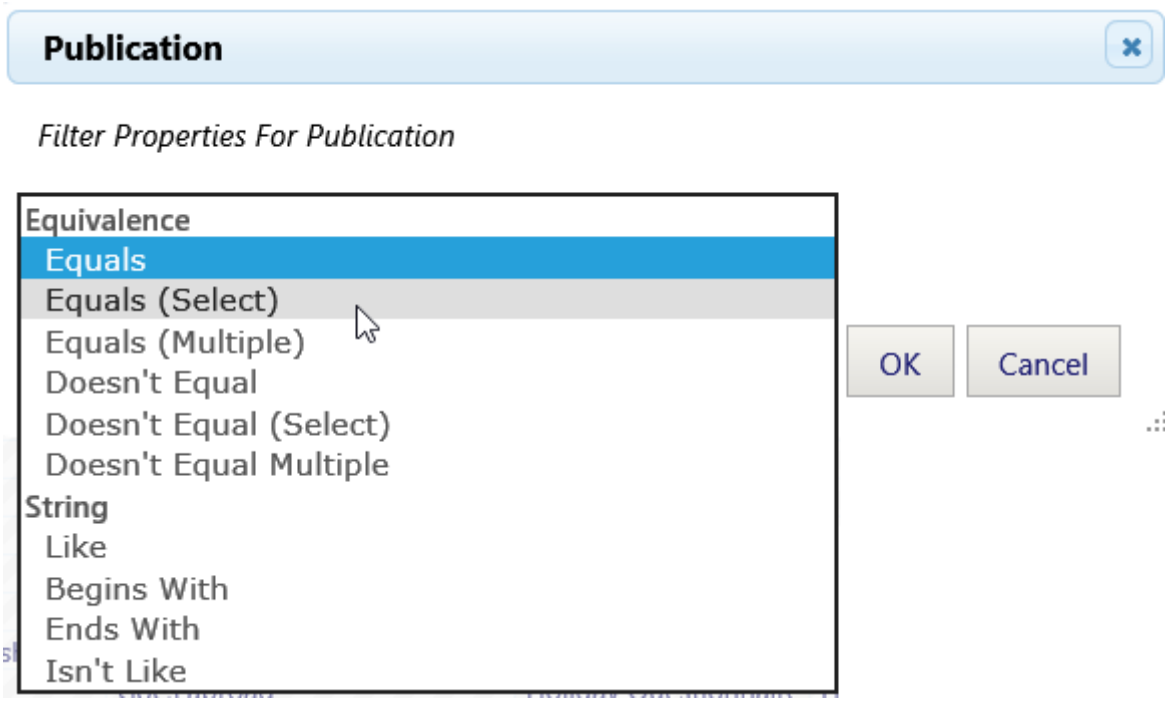
then click the *Add filter* icon.

From the filter's drop-down list, select your required topic, *Publication, Recipient, Answer, etc*.



Click on the Publication Equals' filter's *configuration* icon and,

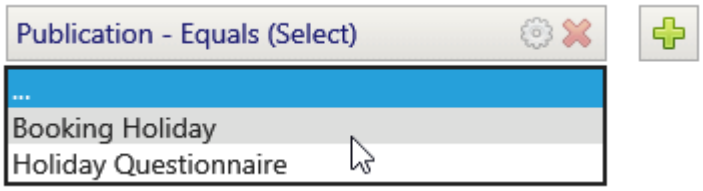
from the *Filter Operator's* drop-down list, select a filter option, then click *OK.*



In the above example, *Equals (Select)* has been chosen.

Because the filters differ for each report, the following table "Filter Operator's Filtering Options for All Reports" on page 374, describes all of the available Filter Operator's *Equivalence, String, Date*, etc., options.

To display a report with your changed filtering options,



select the publication you want to filter on (or select the ellipsis symbol (...) to select all of the available publications), then click *Update results* to display the filtered report.

TABLE 90. Filter Operator's Filtering Options for All Reports

Item	Description
Equivalence	
Equals	Users can only enter one option to filter on.
Equals (Select)	Users can only select one of the displayed options (or all of them, by selecting the ellipsis symbol '...') to filter on.

TABLE 90. Filter Operator's Filtering Options for All Reports

Item	Description
Equals (Multiple)	Users can select one or more (or all) of the displayed options to filter on. To select a list of consecutive options, select your first option hold down the keyboard's *Shift* key then select your final option. To select a list of non-consecutive options, select your first option hold down the keyboard's *Ctrl* key then select each additional option, as required. To select all of the options, choose the ellipsis symbol '...'
Doesn't Equal	Users can only enter one option not to filter on.
Doesn't Equal (Select)	Users can only select one of the displayed options not to filter on.
Doesn't Equal (Multiple)	Users can select one or more of the displayed options not to filter on. To select a list of consecutive options, select your first option hold down the keyboard's *Shift* key then select your final option. To select a list of non-consecutive options, select your first option hold down the keyboard's *Ctrl* key then select each additional option, as required.
String	
Like	Users enter a word or letter similar to the result being filtered on.
Begins With	Users enter a word or letter they want the result being filtered on to start with.
Ends with	Users enter a word or letter they want the result being filtered on to finish with.
Isn't Like	Users enter a word or letter not similar to the result being filtered on.
Date & Time	
Equals (Calendar)	Users select a date from the drop-down calendar to be filtered on.
Comparison	
Is Less Than	Users enter a numeric value higher than the results they want to be returned.
Is Greater Than	Users enter a numeric value lower than the results they want to be returned.
Between	Users enter a low numeric value then a high numeric value which they want the returned results to be between.
Isn't Between	Users enter a low numeric value then a high numeric value which they want the returned results not to be between.

21.5. Adding/Removing Columns From Reports

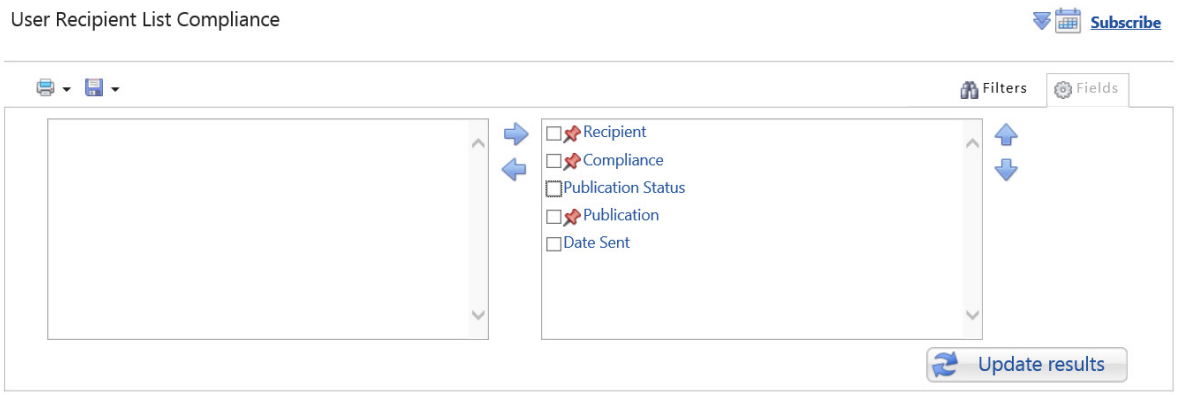
Fields can be added to, or removed from, reports to change which *columns* are displayed.

Click *Fields* to display all of the available column headings. Unused (hidden) fields are shown on the left and fields which are currently used as column headings are shown on the right.

Note: Fields which are *Pinned* to the right-hand side (display) column are mandatory and cannot be removed from reports, but their positions can be changed by use of the *Up*/*Down* buttons. Fields which are not *Pinned* to the right-hand side (display) column can be removed or have their position changed in reports.

Select one or more fields and use the left or right arrow buttons to move the field(s) from one list to the other to show or hide fields.

Similarly, select one or more fields and use the *Up* and *Down* buttons to change the order the fields (columns) are displayed in the report.



The field at the top of the right-hand side list (*Recipient* in the above example) will be displayed as the left-most column in the report, the field second from the top will be displayed second from the left, etc. The field at the bottom of the list (*Date Sent* in the above example) will be displayed as the right-most column in the report.

Click *Update results* to display the report with its changes.

21.6. Sorting Report Data Within Columns

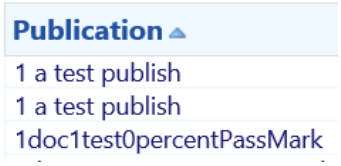
Information in the majority of reports can be sorted by fields (columns) from the initial report data into numerical/alphabetical order or vice versa. The following example is typical of the various report headers generated in a report:

Publication	Date Sent	Sent By	Compliance	Percentage

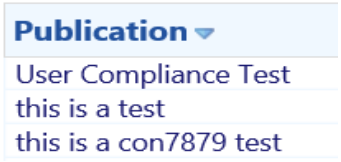
In an unsorted condition the column header will not display any icons and the data in that column will be in it's original format.

Publication
publish and in progress,
rules check
inbox test without conversion

Clicking on a column header once will sort the data into numerical/alphabetical order and the column will display a sort icon to the right of the column header.



Note: The sort column function is not available for all report columns. In these instances the sort icon will not be displayed when clicking the header and the column data will remain unchanged. By default, columns generated in a report are displayed from left to right, regardless whether a column has active or inactive column sort ability.



Clicking on the column header again will reverse the order of the data in that column and an inverted sort icon to the right of the column header will be displayed.

Note: If one column is sorted and then a second column is selected, the order of the first column takes precedence of the sort sequence.
In some reports the sort column function is not available. In these instances the sort icon will not be displayed when clicking the header and the column data order will stay unchanged.

21.7. Report Pagination

The maximum number of rows displayed in the report window is 1,000 rows per page. If more than 1,000 rows are found, a second page is generated and the navigation tool bar becomes visible in the bottom left corner of the main report window with the number of reports and the total number of items listed.

Note: In this example the left arrow buttons are inactive (grey) as the report is on the first page. Only the right arrow buttons are active and can be selected to navigate to page 2 of 2.

The report pagination toolbar can be used to navigate between pages using the following arrow buttons:

- Selecting this button moves to the next page in the reports list.

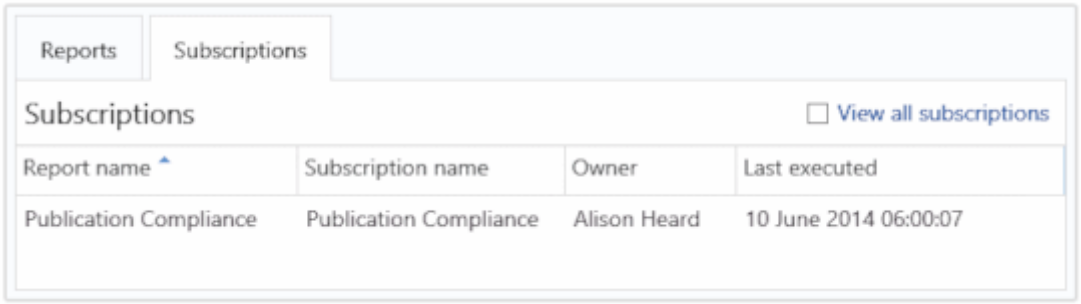
- Selecting this button moves to the last page in the reports list.

- Selecting this button moves to the previous page in the reports list.

- Selecting this button moves to the first page of the reports list.

21.8. Subscriptions

To view, delete or update existing report subscriptions or create new subscriptions: on the *Reporting* page, select the *Subscriptions* tab.



The column headings under the *Subscriptions* tab are described in Table 91.

TABLE 91. Viewing Current Subscriptions

Item	Description
Report name	The name of the PolicyHub Report.
Subscription name	The subscription name entered when the subscription was created (or last edited).
Owner	The name of person who created the subscription. **Note:** When a subscription is created by a User who has logged in using either a user name or email address, the owner for that subscription will be displayed as *System*.
Last executed	The date and time the subscription task was last performed - that is, an email was sent or a report was put on a Server File Share.

Note: When a User is logged in automatically, by default they will be shown only their own private subscriptions (that is, ones for which they are the *Owner*). They may also view (and edit) all subscriptions by selecting the *View all subscriptions* option (on the top right-hand side of the page). This option allows them to see all the subscriptions created by all PolicyHub Users. However, Users who log in with a user name or email address do not have a private

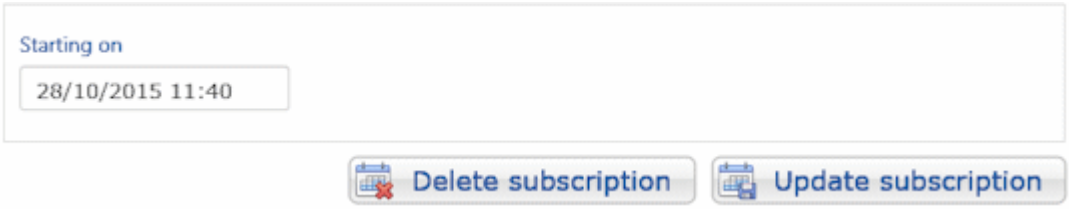
view of their own subscriptions – they see everyone's subscriptions. These Users, therefore, are not presented with the *View all subscriptions* option.

21.8.1. Deleting Subscriptions

To delete an existing subscription, select a subscription from the list of subscriptions displayed below the Subscriptions tab.

The selected subscription's details are displayed.

Click the *Delete subscription* button.



21.8.2. Updating Subscriptions

To update an existing subscription, select a subscription from the list of subscriptions displayed below the Subscriptions tab.

The selected subscription's details are displayed.

As required, edit the subscription details (See "Creating Subscriptions" on page 380 below, for more information) and when complete, click the *Update subscription* button.

21.8.3. Creating Subscriptions

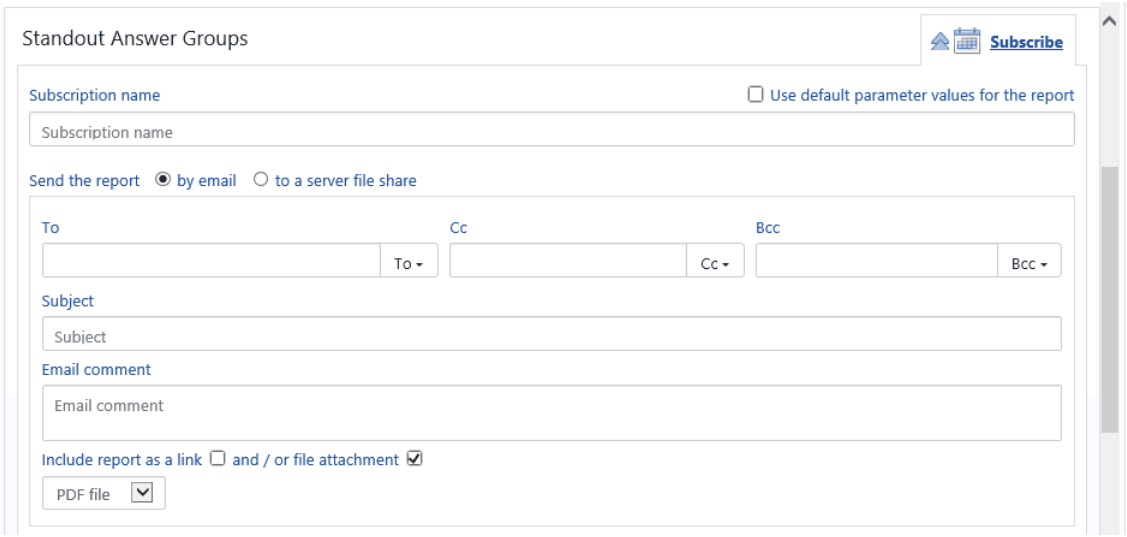
When viewing a current Report, an administrator can create a subscription to it by clicking the *Subscribe* text link and completing the subscription details.

Note: Subscribing to a report removes the need for you to select, set up, view and send the report to specific recipients each time you need to distribute up-to-date information.

21.8.4. Subscribing To Email

Subscribers can be sent Reports by email.

- The report can be sent to each subscriber
- A link to the report PDF file can be sent to each subscriber
- Both the report and a link can be sent to each subscriber



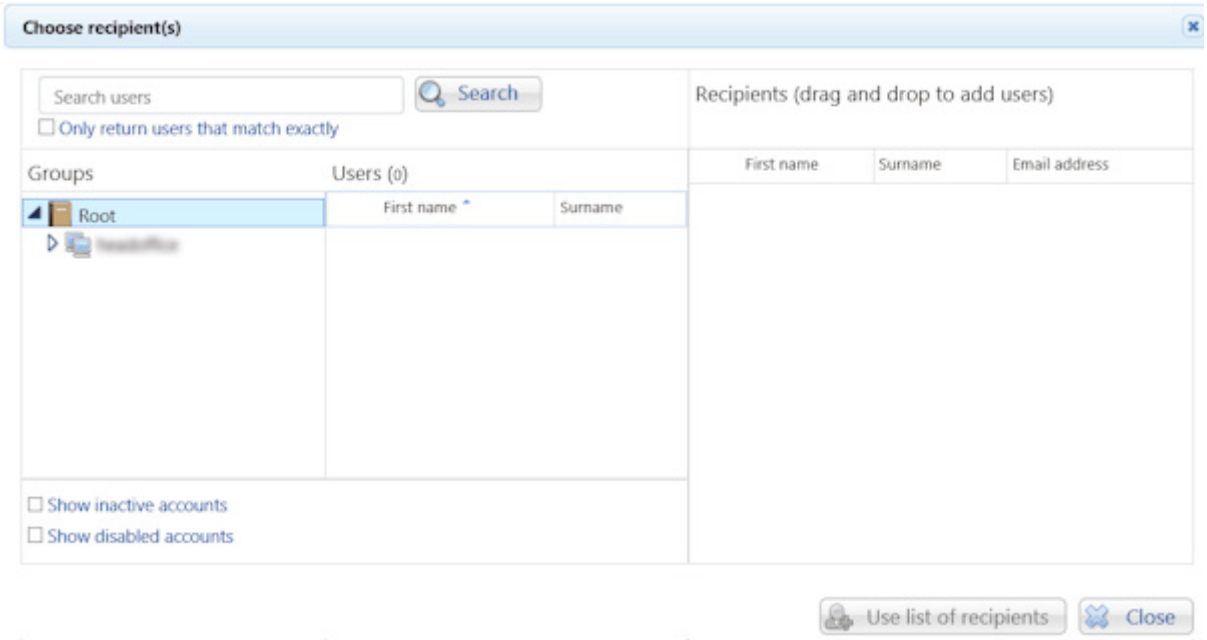
Enter a name for the subscription in the *Subscription name* box.

If you want to send out the report only for the default dates (today and previous six days), select the *Use default parameter values for the report* tick box.

Select the *by email* option to have the report delivered by email.

Enter all relevant *To*, *Cc*, *Bcc* and *Subject* details.

Email addresses can by typed directly in to the *To, Cc* and *Bcc* text boxes. Alternatively, to add the email addresses of PolicyHub users, click the *To*, *Cc* or *Bcc* button (as required).



Search for the names of the users you want to add to the email subscription and drag the names to the panel on the right.

Alternatively, expand the *Groups* tree, select a Group and drag the names from the Users panel to the panel on the right. When you have selected all the required names, click *Use list of recipients*. The users are added to the email subscription. (To delete a user from the email subscription, delete the user's email address from the *To*, *Cc* or *Bcc* text box.)

Enter a descriptive *Subject* for the email (this is mandatory).

If required, enter some helpful comments in the *Email comment* section. The comments will added to the email, above any link (if available and if configured).

When using *Windows* authentication, the option to: *Include report as a link and/or file attachment* is displayed.

To include a link to the report in the email, select the *Include report as a link* tick box.

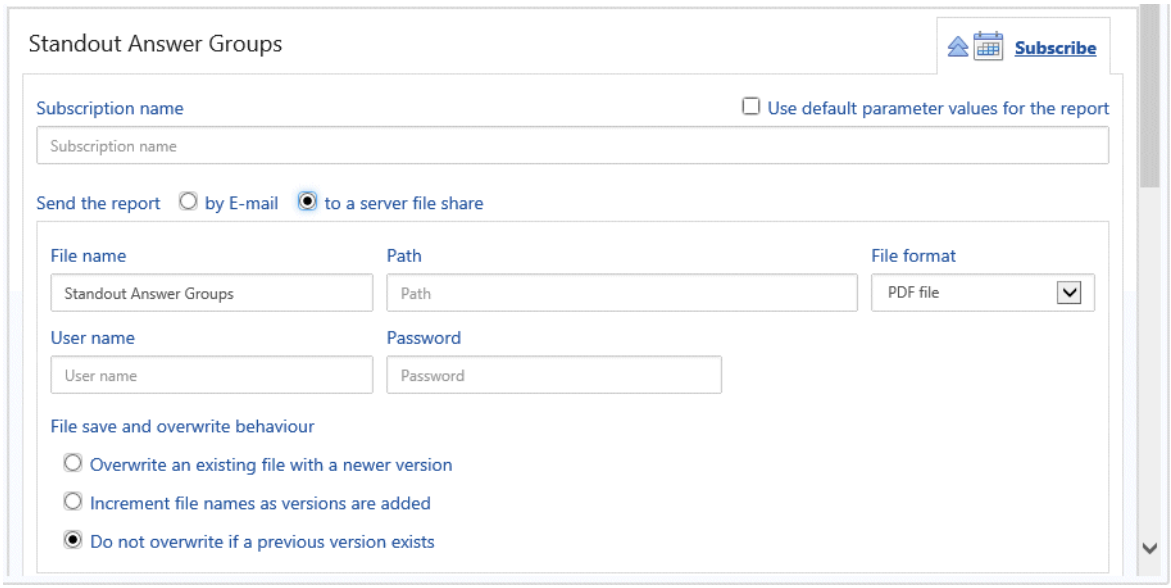
To include the report as a file attachment, select the *file attachment* tick box and select a *Format* for the attachment from the drop-down list (PDF, Word, etc.).

Note: The option to include a report link is available when logged in to PolicyHub using Windows authentication only. A *report link* cannot be used when creating a subscription when logged in to PolicyHub using Forms authentication or ADFS.

To send out a report with a specific date range and or schedule, see "Subscription Schedule" on page 383.

21.8.5. Subscribing To A Server File Share

Reports can be sent to a shared folder on a network where they can be accessed as needed.



Enter a name for the subscription in the *Subscription name* box.

If you want to send out the report only for the default dates (today and previous six days), select the *Use default parameter values for the report* tick box.

Select the *to a server file share* option to have the report delivered to a folder on a local or networked hard disk drive (HDD).

If required, edit the *File name* of the report. This is the name of the report on the Server File Share.

Enter the path to the shared network folder where the reports will be saved. This field is mandatory. The *Path* must follow the Uniform Naming Convention (UNC) which has the format: \\Server\Directory

Note: The *Directory* must be a shared folder and the user whose credentials will be used to save the report must have write access to the folder.

Select a *Format* for the attachment from the drop-down list (PDF, Word, etc.).

Enter the *User name* and the *Password* of the person who has write access to the configured path. These fields are mandatory.

In the *File save and overwrite behaviour* section, select an *Overwrite* option. These options determine what happens to the old report when a new version of the report is saved.

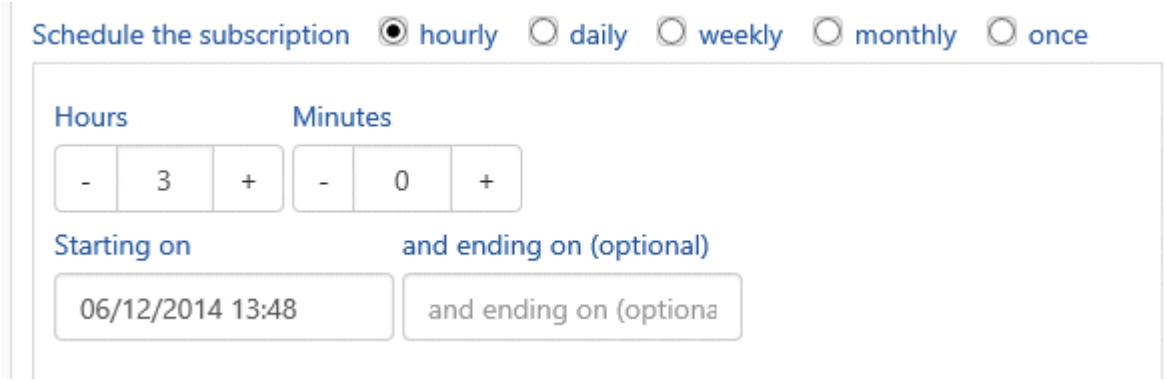
- *Overwrite an existing file with a newer version* – each time a new report is generated, it overwrites the existing report.
- *Increment file names as versions are added* – each time a new report is generated, the file name is incremented. Older reports are *not* overwritten.
- *Do not overwrite if a previous version exists* – each time a new report is generated, a check is made to determine if a report with the same name already exists on the file share. If a report with the same name already exists, the new report is discarded. If the report does not already exist, the new report is saved on the file share.

To send out a report with a specific date range and or schedule, see "Subscription Schedule" on page 383.

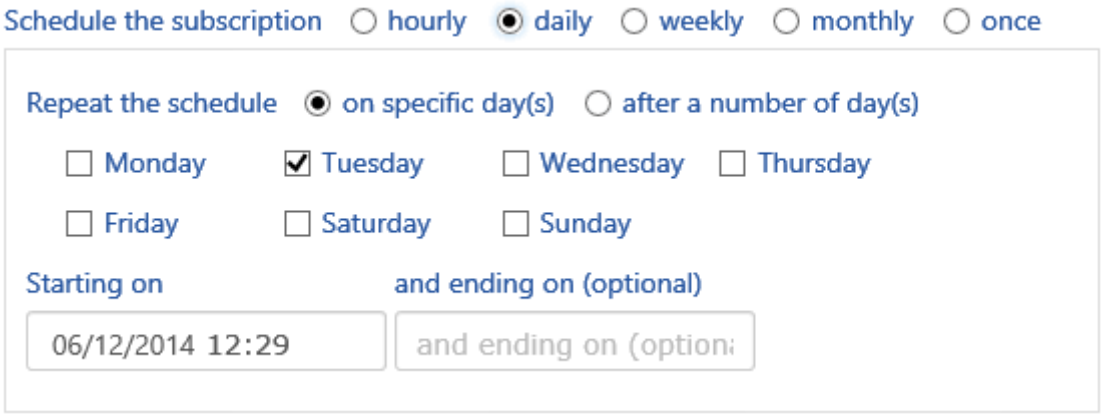
21.8.6. Subscription Schedule

In the *Schedule the subscription* section, select the interval at which the subscriber reports are run:

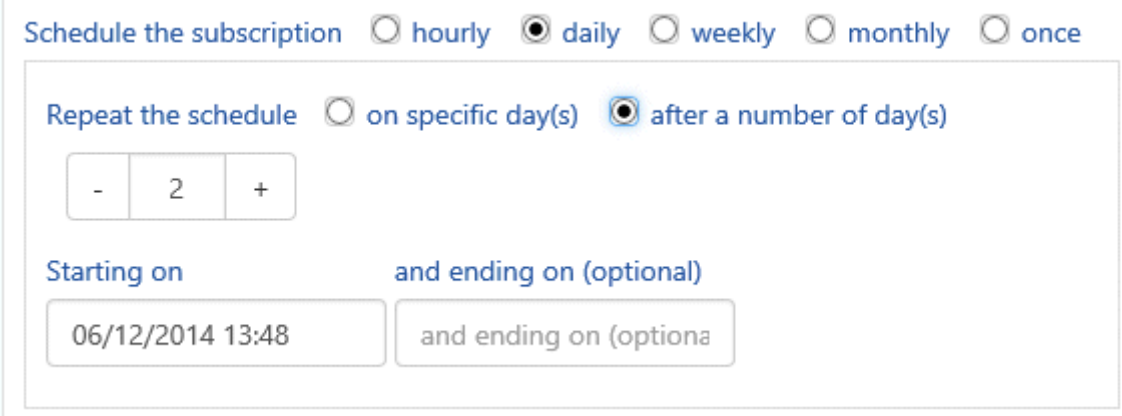
Hourly intervals,



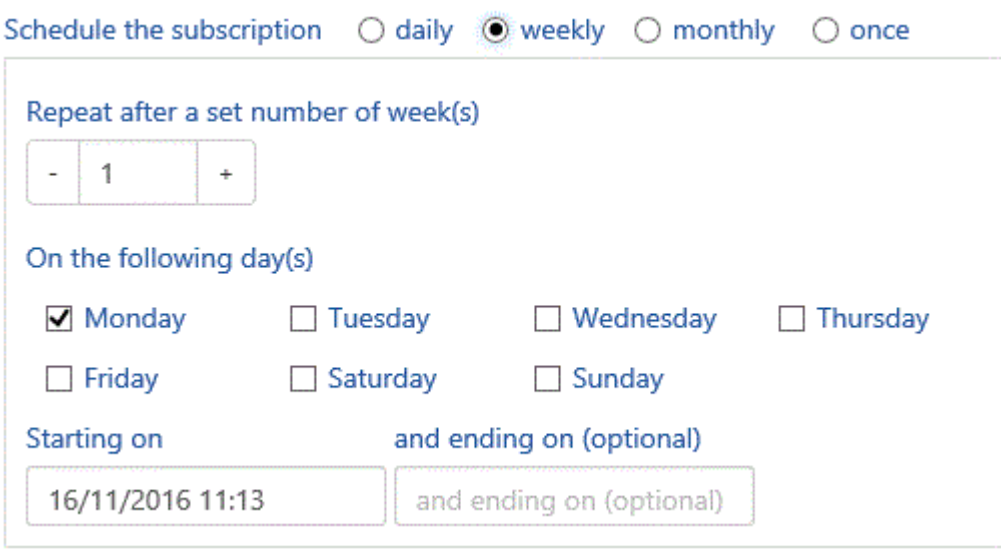
Daily intervals,



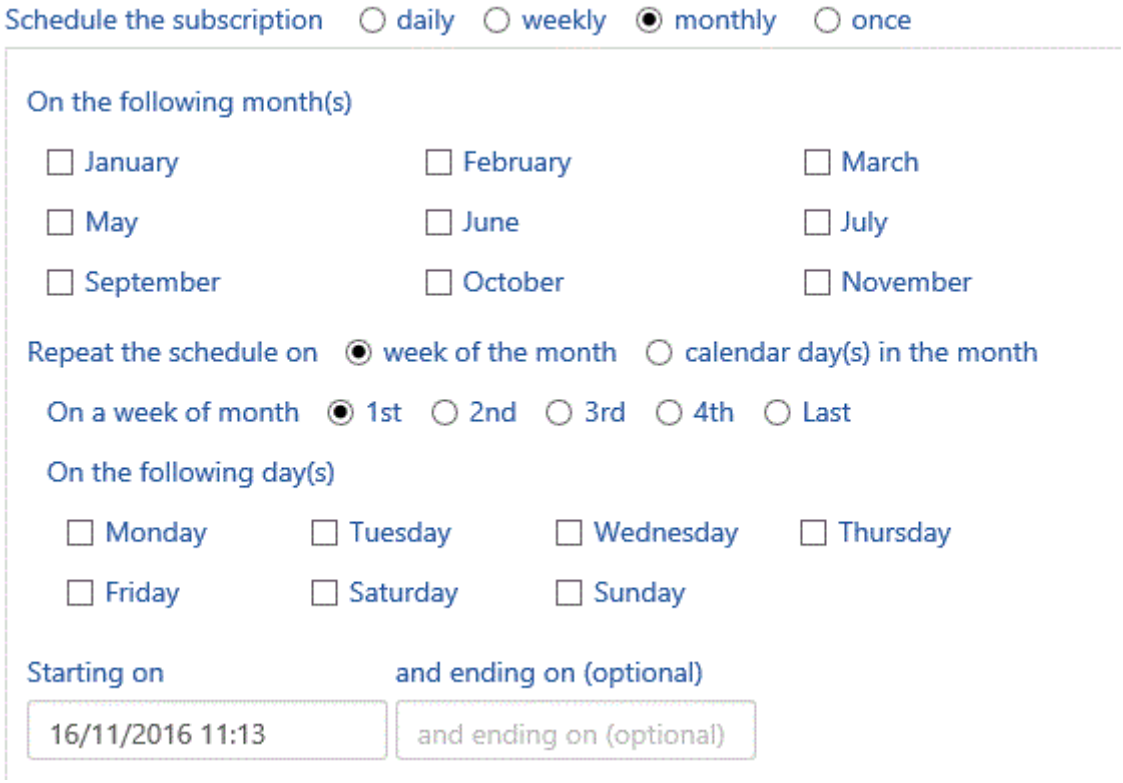
When *Daily* is selected, you can *either* choose the days of the week on which to send out the report by selecting *on specific day(s)*, see above *or* you can select *after a number of day(s)* see below and enter (for example) *2* which would send the report out on the *Starting on* day and then every other day after that.



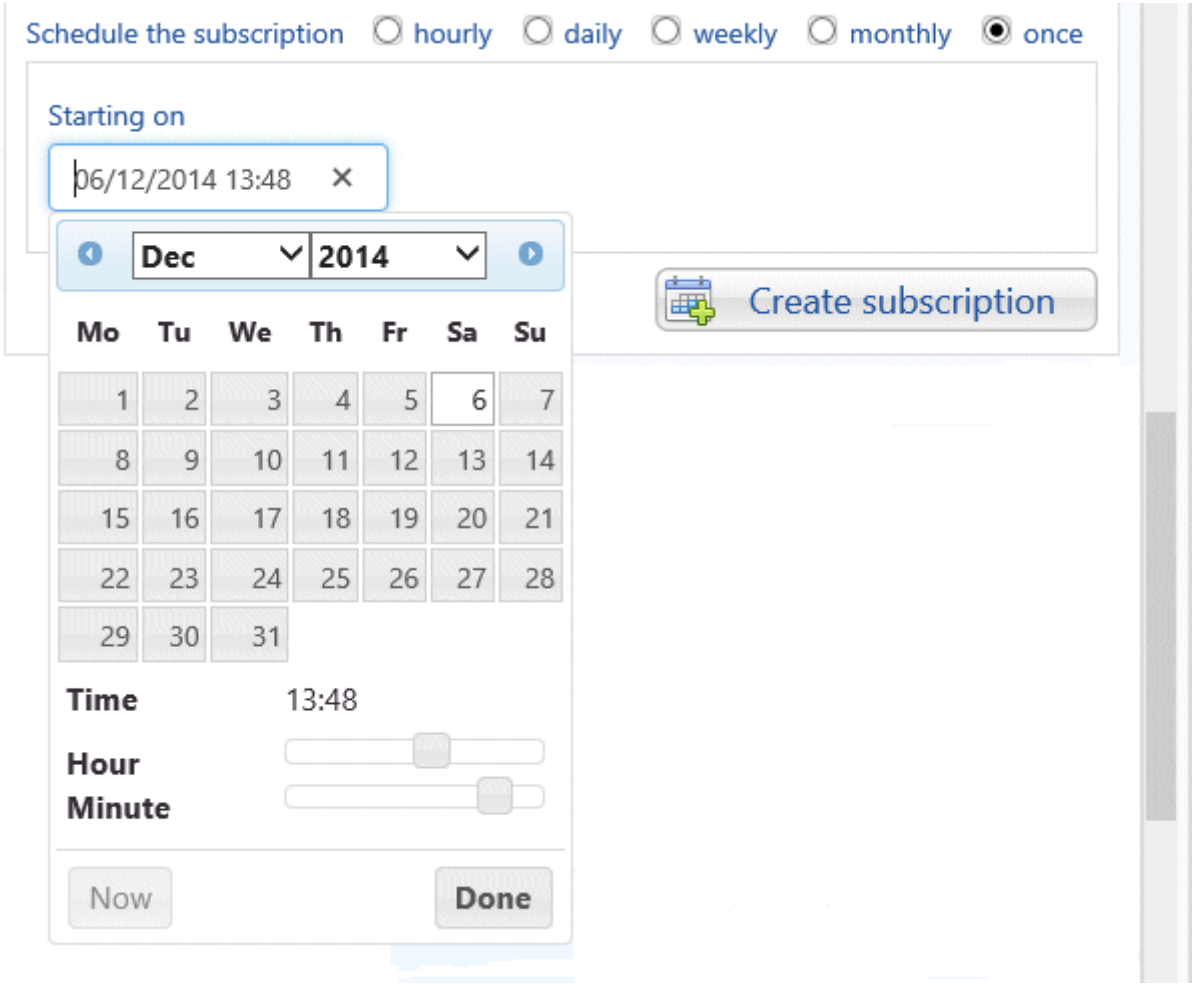
Weekly intervals,



Monthly intervals,



Only *Once*.



Complete the required *Hourly*, *Daily*, *Weekly* or *Monthly* report subscription schedule details, as required.

When you have completed your selection, open the *Starting on* calendar and select the date you want the report subscription to start, then click *Done*.

Hourly, *Daily*, *Weekly* or *Monthly* report subscription can be left to run indefinitely, or you can configure an end date for the schedule.

To set an end date, click in the *and ending on (optional)* text box to open the end date calendar and select a date. When selected, end date the calendar will close automatically.

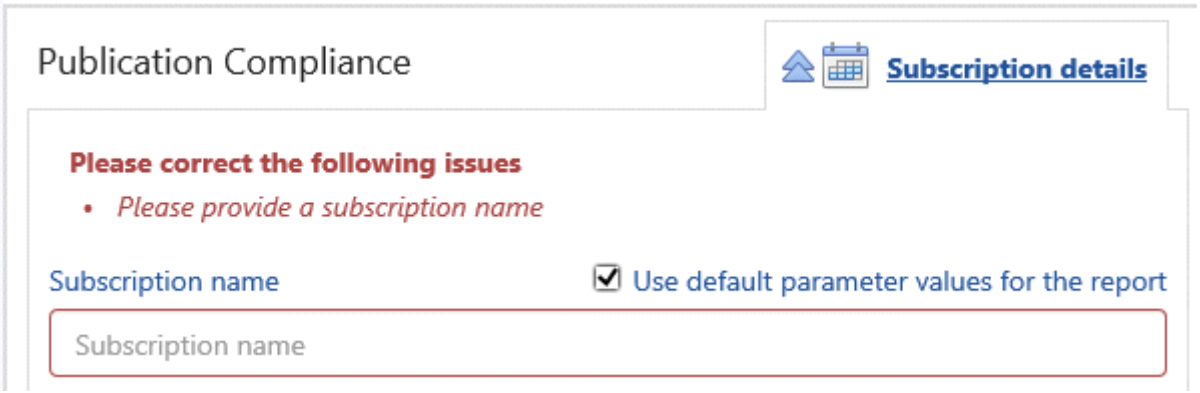
The subscription will end at the end of the selected day.

21.8.7. Saving The Subscription

Click the *Create subscription* button to save the new subscription or click the *Update subscription* button to save changes made to an existing subscription.

A field which is outlined in red must be completed correctly before the subscription can be saved.

A description of the error is also displayed.



Note: The report will be sent to your selected recipients at the intervals requested.

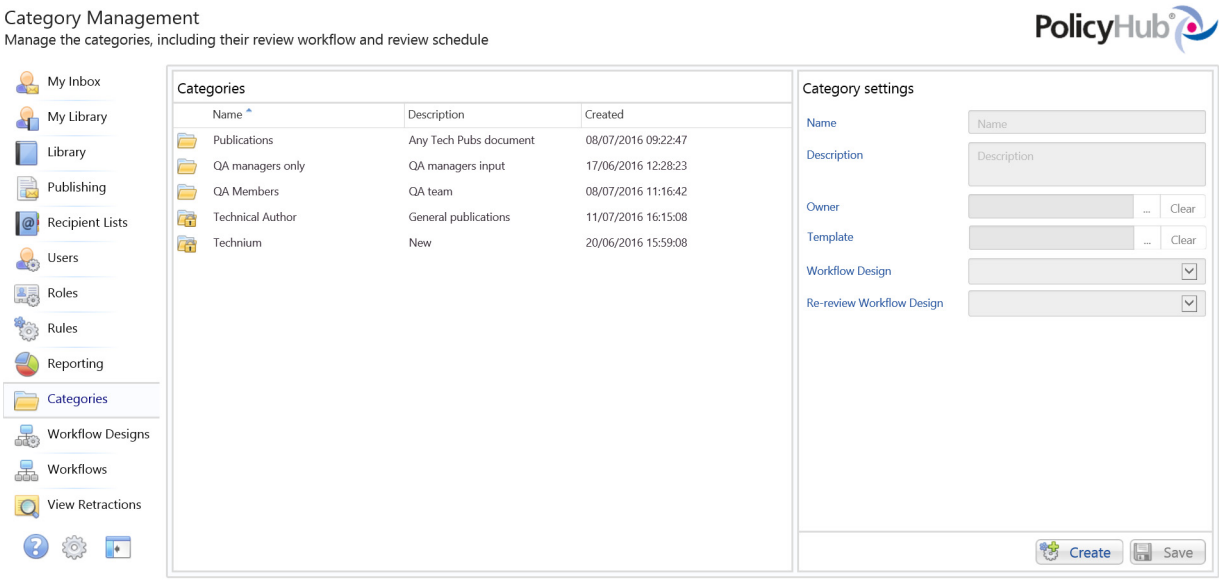
22. Categories

Categories control which Workflows are allowed for a set of policies. Categories are linked to policies, similarly active Workflows are also linked to policies. *Categories* are assigned to publications that have been published with the review and approval procedure described in “Workflow Designs” on page 399.

Note: Categories are available depending on your PolicyHub system licence.

22.1. Create Category

To create a Category, first select *Categories* from the main menu on the left of the page.

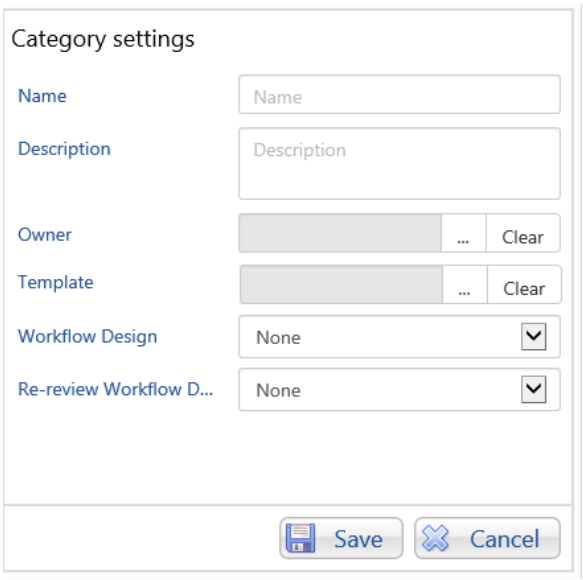


Note: A Category can only be created and saved by a *User* with *Category management* Write permissions, see “Category Management” on page 350.

1. At the bottom right of the main screen click on the *Create* button.

The *Category settings* pane is displayed.

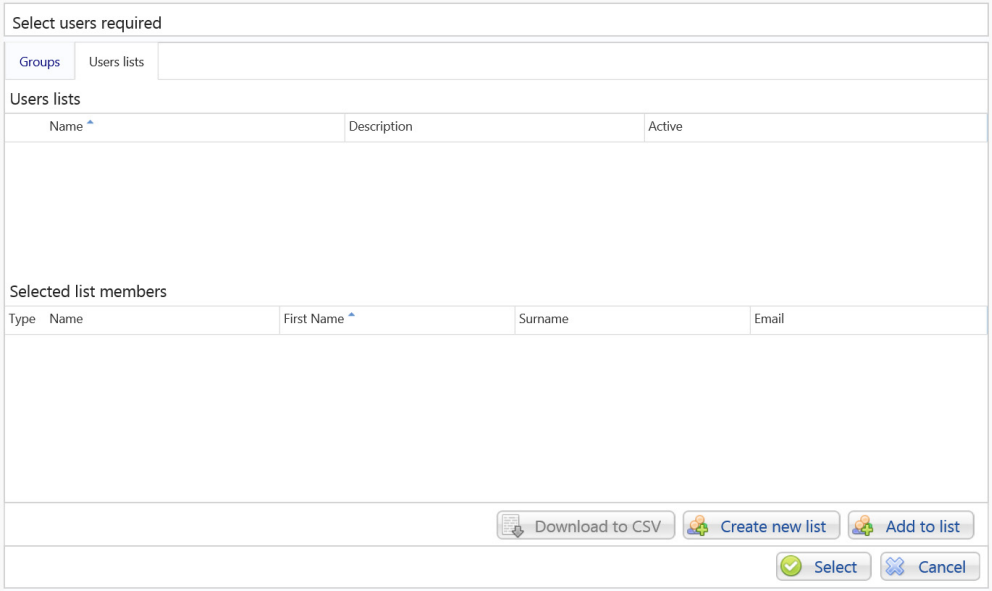
2. In the *Name* text box enter a name for the *Category*. The name must be unique; you cannot create two Categories with the same name.



3. In the *Description* text box, enter an explanation for the *Category*, if required.
4. In the *Owner* field, select the ... icon.

   See “Category Assigned Owners” on page 396 for further information on Owners.

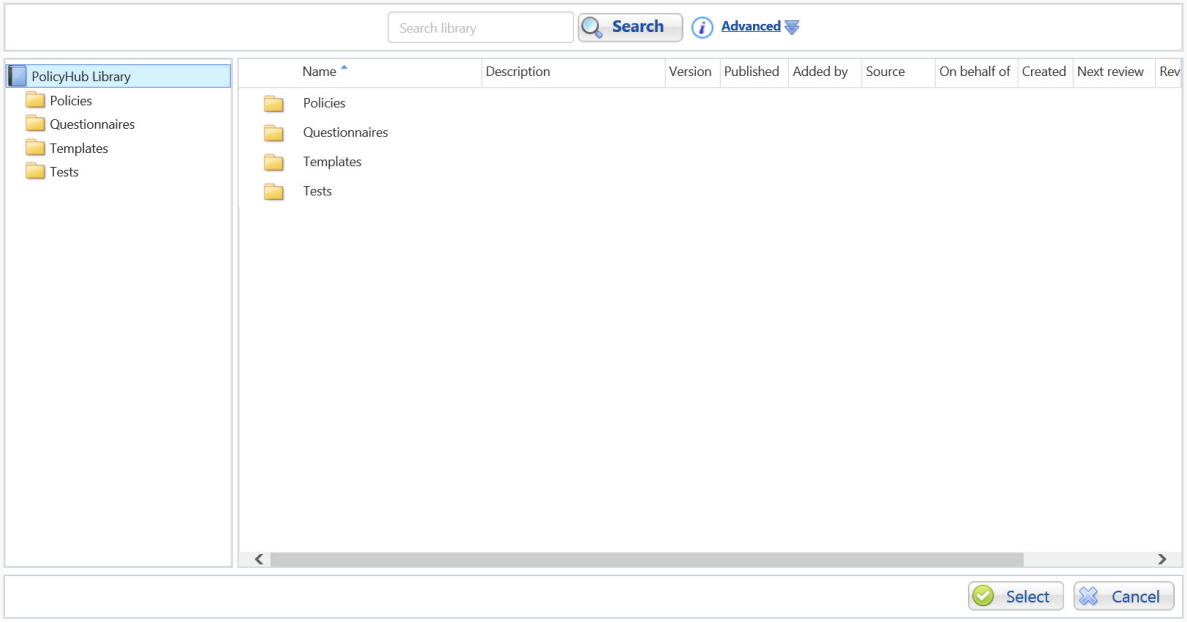
5. A *Select users required* window will open where you can select Category owners. The *Select users required* window behaves in a similar manner to the “Recipient Lists” on page 297.



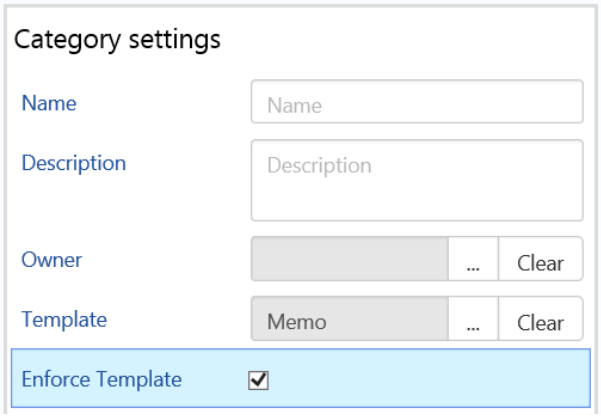
   After selecting the owner from the *Select users required window*, select the *Save button* which will return you to the Category settings pane.

6. To remove the *Owners* from the list select Clear.

7. If you wish to link a template to the *Category,* select the ... icon in the *Template* field. PolicyHub will open a *Library* view. See "Upload Template(s)" and "New Template" for more details.



8. In the *Library* view, choose the template required and click the *Select* button to save the *Template*.
9. Click the *Cancel* button to return to the *Category setting* pane without linking a *Template.*
10. With a template selected the *Enforce Template* check box is available. If this is selected, all new policies will use the chosen template. If the check box is not selected a list of templates will be displayed with the highlighted one being the default selection



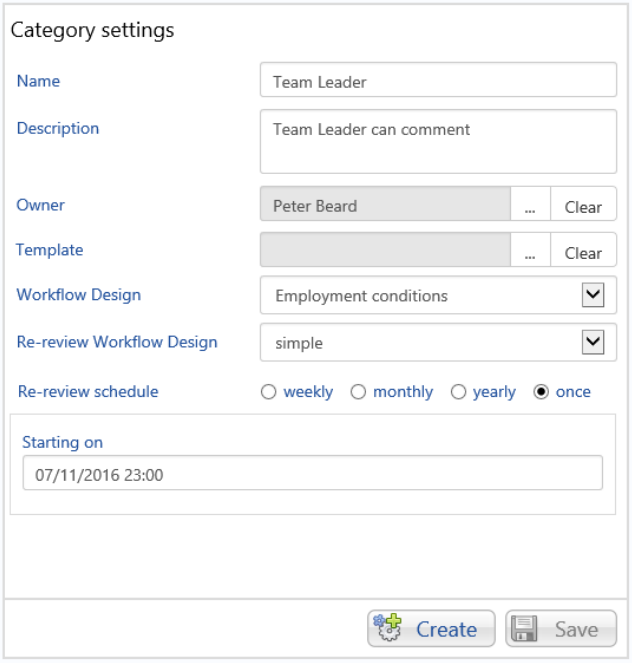
Note: When *Enforce Template* is applied to a Category, the chosen template will be used for all new documents created in the library folder. The "Upload Document(s)" menu will not be available.

11. From the drop down list in *Workflow Designs*, choose the Workflow you want the Category to be linked to. "Workflow Designs" on page 399 provides a detailed description of *Workflow Designs*.
12. From the drop down list in *Re-review Workflow Design*, you can optionally select a Workflow Design to schedule for re-review, see "Workflow Re-review Schedule" on page 391.

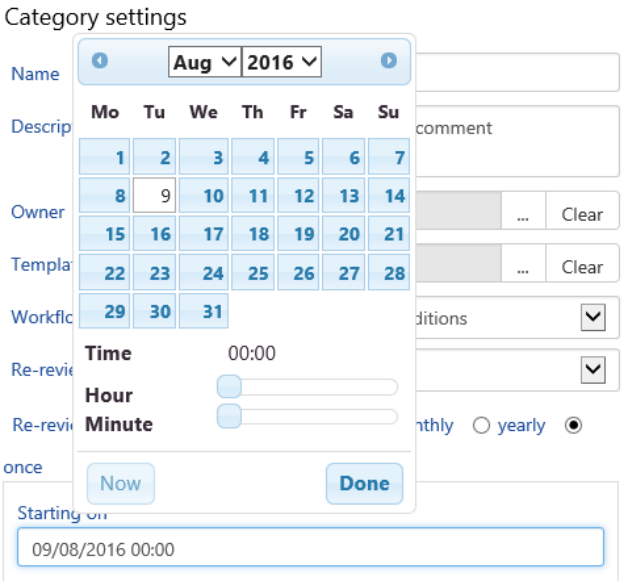
22.1.1. Workflow Re-review Schedule

A Category has an optional selection to re-review library items associated with the Category. The selection determines the frequency for the re-review. The re-review can be configured to *once*, or at various *weekly, monthly or yearly* intervals for a defined period of time.

The default setting is *once*.



When *once* is selected, click in the *Starting on* box to open a calendar. Select the date and the time.

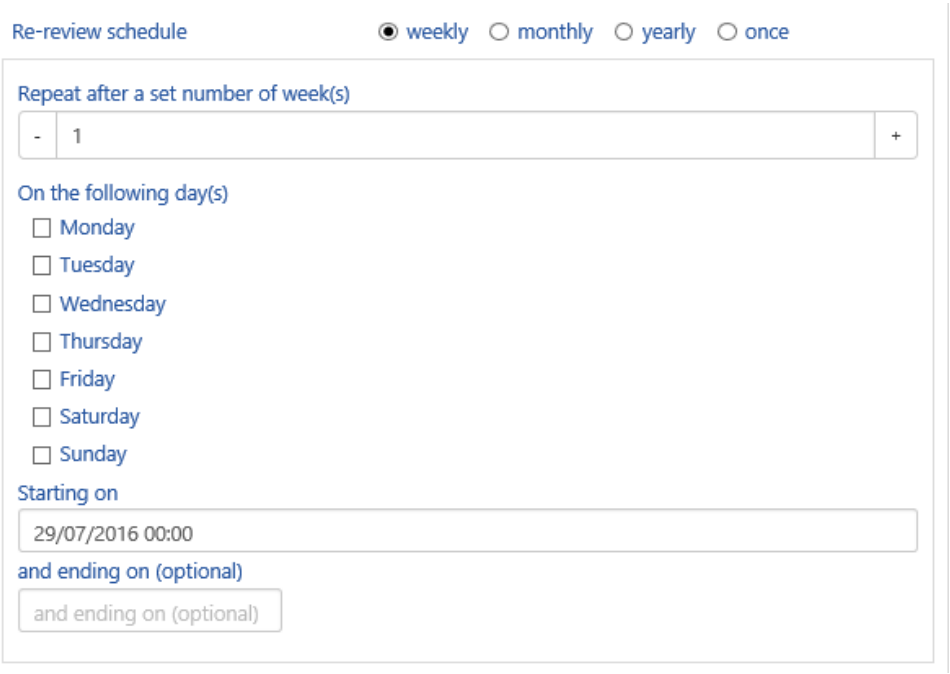


Note: The *Starting on* value must always be later than the current date value.

Click *Done* when you have configured the required date and time.

When *weekly* is selected, you can set a value for *Repeat after a set number of week(s)* and you can select the days of the week you want the re-review to be started. For example, to start a

re-review every other Monday, set *Repeat after a set number of week(s)* to *2* and select Monday.



When *monthly* is selected, you can select the months you want the re-review to be sent. The re-review can then be sent on specified weeks of the month, or on specified calendar days of the month.

When *week of the month* is selected, the re-review can be sent out on the *1st, 2nd, 3rd 4th* or *Last* week of the month on the specified days of the week. When *calendar day(s) in the month* is selected, one or more calendar days can be entered in the text box.

A comma must be used to separate multiple values.

When *yearly* is selected, click in the *Starting on* box to open a calendar. Select the date and the time required.

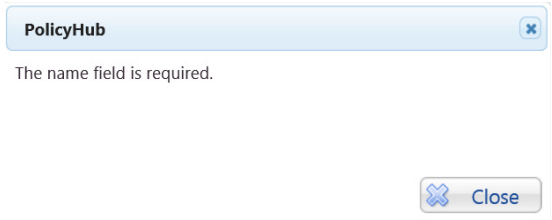
You can set the re-review frequency in the *Repeat after a set number of month(s)* field. In the example below the re-review will be sent 2 years (24 months) after the *Starting on* date and time at midnight on the 12th July 2018.

Click *Done* when you have configured the required date, time and re-review repetition.

Weekly, monthly or yearly re-reviews can be left to run indefinitely, or you can configure an end date for the schedule. To set an end date, click in the *and ending on (optional)* text box and select a date from the pop-up calendar. Click *Done* when you have selected the required date. The schedule ends at the end of the selected day.

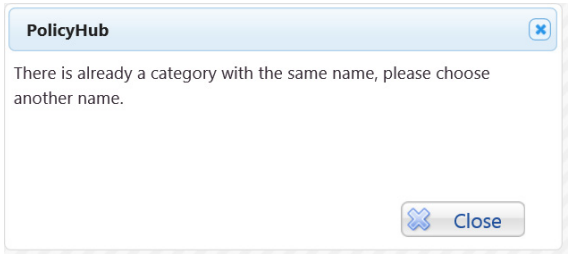
Complete the required *weekly, monthly or yearly* re-review Schedule details, as required. When you have completed your selection, click in the *Save* button.

If the *Name* field is not entered, the following pop-up will open:



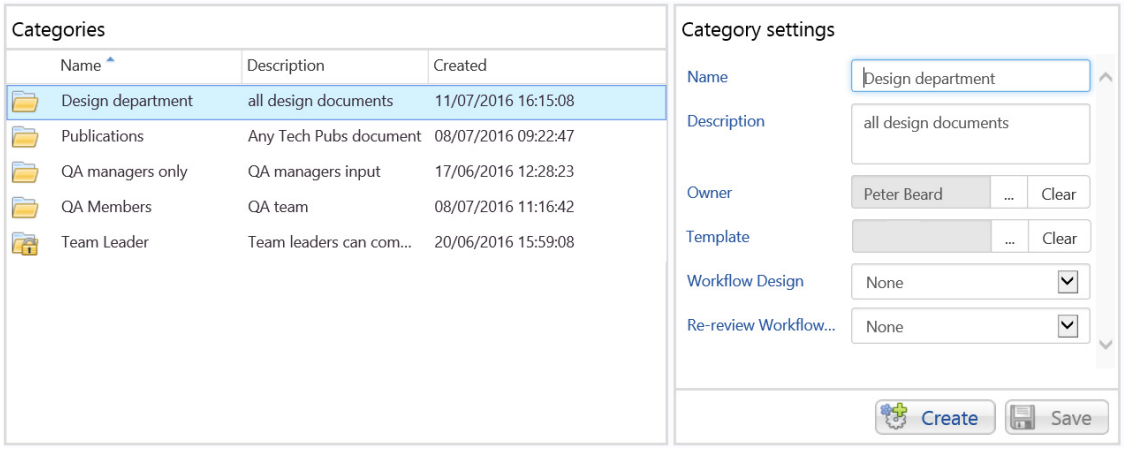
Select *Close* and enter the missing name in the *Name* field.

A Category name must be unique. If the same name is used (even varying by upper and lower case text) PolicyHub will prevent the Category being saved and the following prompt will open:



Correct the naming error and select the *Save* button again.

The newly created Category is then added to the main pane in alphabetical order.



22.2. Edit Category

Select a Category from the main pane. The *Name* and *Description* will appear in the *Category settings* right pane.

To edit the Category, type the changes required in the *Name* and *Description* fields and select *Save.*

Note: You must have write permissions to edit a Category see “Category Management” on page 350.

22.3. Sort Category

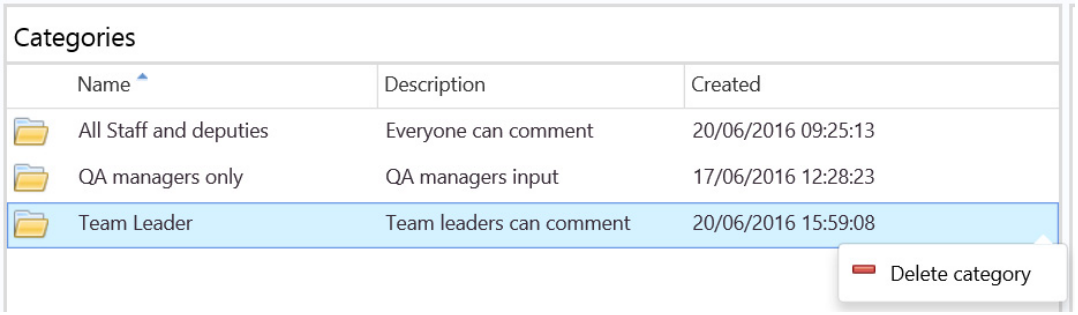
Categories can be sorted by clicking on the column titles *Name*, *Description*, *Created.* Clicking on a column title once will sort the data into numerical/alphabetical order. Clicking on the column title again will reverse the order of the data in that column.

All columns can be sorted in ascending and descending order.

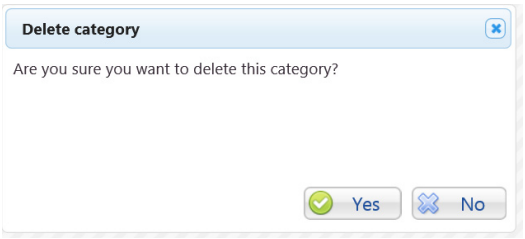
22.4. Delete Category

Select an existing Category from the categories pane.

Right click on the Category or alternatively, select the drop down option at the end of the row.

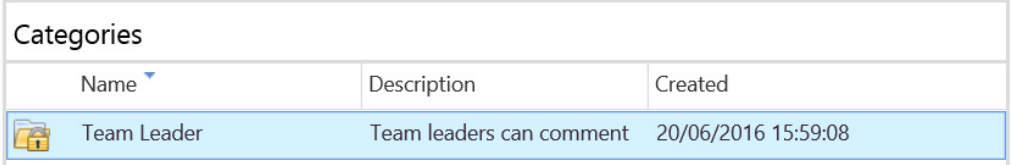


Select *Delete category*. A prompt will ask if want to delete the Category:



- Select *Yes* to delete.
- Select *No* to return to the categories pane and cancel the deletion.

Where a Category has already been assigned to one or more folders or documents, it is denoted with a locked Icon. In the example below, the *Team Leader* Category is locked.



If you delete an assigned Category then the folders and documents will no longer be set to use that Category. Any imposed review and approval Workflows or scheduled Re-review Workflows will no longer be applied to the documents currently assigned to this Category. All documents uploaded to these folders will be approved automatically.

Note: You will see a warning message advising you that the Category assignment will change if you delete the assigned Category.

22.5. Category Assigned Owners

An *Owner* is the person responsible for the policy. A policy *Owner* grants a user particular permissions that expands on the basic role settings described in “Roles” on page 343.

22.5.1. Owner Assignment

The *Owner* list is a recipient list that is private to ownership and to the Workflow Review and Approval process. It can be configured when creating a Category.

An *Owner* is a list of users that are permitted to edit, publish and request comments for a policy, based on their role assignment. If an *Owner* list is not specified in a Category then it is the set of *Users* that are deemed the *Owners* of the policy.

Owner assignment is selected from the *Category settings* pane, see “Create Category” on page 388.

22.5.2. Policy Permissions

Policies inherit ownership from the Category they are assigned to. If the policies aren't assigned a Category, or their Category does not specify an ownership then they are owned by the set of *Users* that have access rights to edit and publish them in the library (See “Document Library Folder Access” on page 351, “Send Standard Publications” on page 349, “Send Review Publications” on page 349, as well as the permissions for the folder containing the policy).

Ownership provides the following permissions (for documents, tests and questionnaires):

- Publishing a document, test or questionnaire.
- Send a request for comment (using “Reviews” on page 276) for a document, test or questionnaire.
- Send for Review and Approval.
- Create a new policy (via upload or template).
- Create a new test or questionnaire.
- Copy questionnaire.
- Create a new template.
- Edit an existing document (via upload or edit).
- Edit or create a new revision of an existing test or questionnaire.
- Edit an existing template.
- Delete a document, test or questionnaire.
- Activate a revision of a document, test or questionnaire (if allowed).
- Cancel / restart a process.
- Retract / recall a policy.
- Retract / recall a publication containing only policies they own.

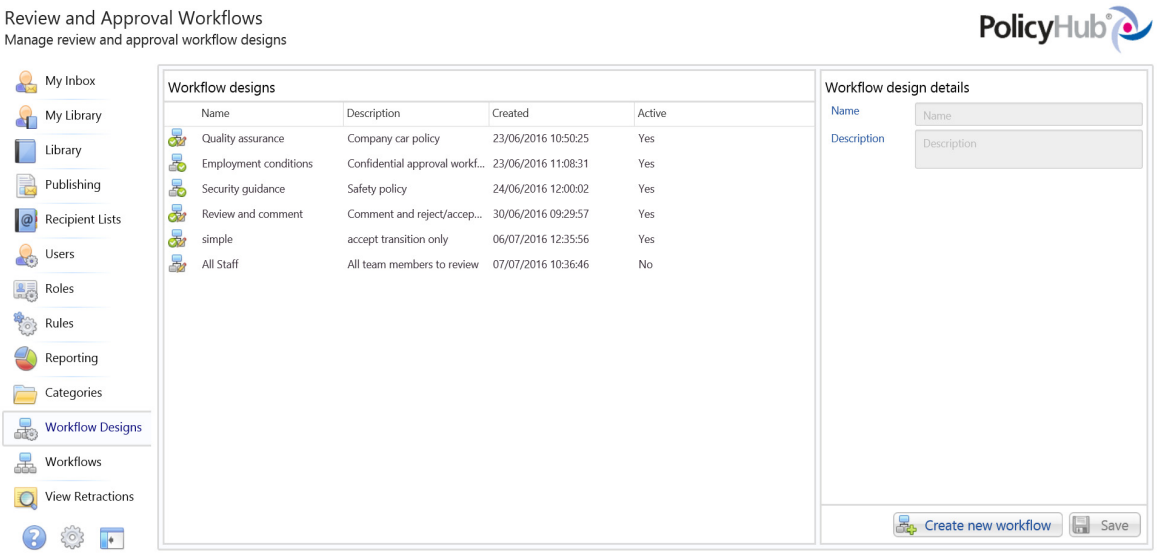
- Resend publication to all non-complied Users.
- Manage associated tests.
- Configure review schedule.
- Edit policy / revision meta-data.

Note: Policy ownership does not control who can view the policies. This is determined by role permissions, see “Roles” on page 343.

23. Workflow Designs

Workflow Designs are used to create formal review and approval procedures to publish one or more publications.

Note: *Workflow Designs* are available depending on your PolicyHub system licence.



23.1. Creating A Workflow

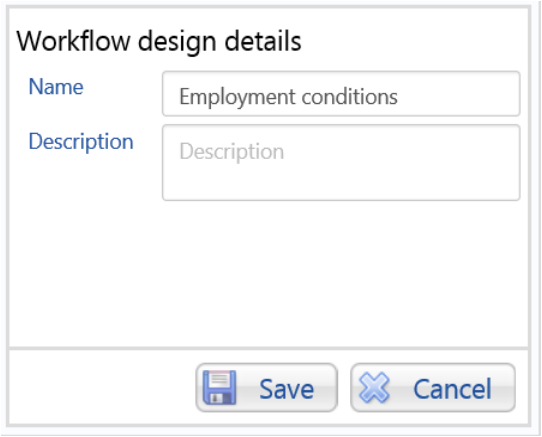
The following information describes the process where a publication can be shared with one or more people for review and provide their comments to accept or reject one or more publications.

Workflow Designs is a graphical designer that displays Step and Action phases for a user to manage publication reviews and approvals. The Workflow designer provides a visual representation of the process containing the Steps and Actions.

Clicking on the *Workflow designs* option in the main menu displays the *Workflow designs* pane. To create a new Workflow click on the *Create new workflow* button at the bottom of the pane.

In the *Name* text box enter a name for the *Workflow*. In the example below, Employment conditions. The name must be unique, you cannot create two Workflows with the same name.

Enter a description of the Workflow in the *Description* text box.

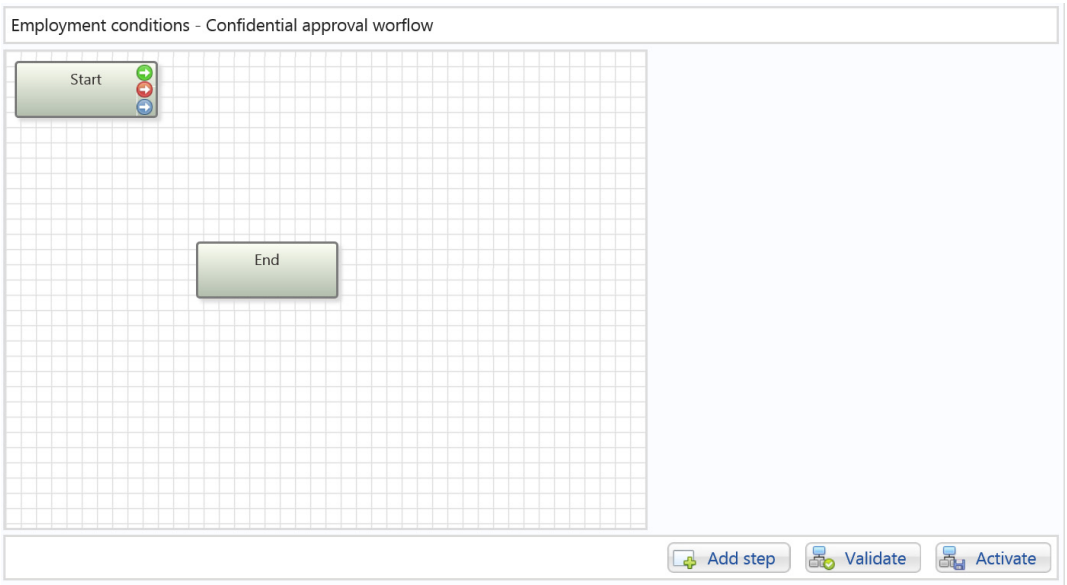


Clicking the *Save* button, at the bottom of the pane saves the Workflow in the *Workflow designs* pane. To create Steps in the Workflow see “Workflow Steps” on page 400.

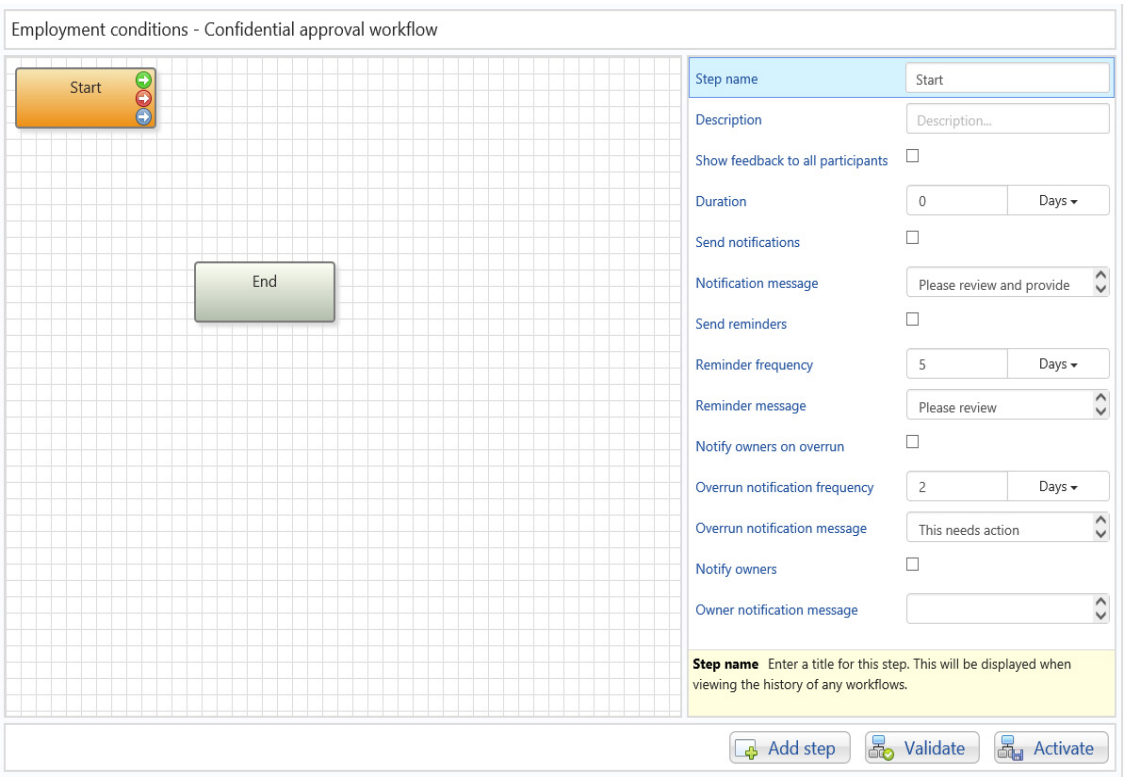
Once a new Workflow design has been created, any additions or amendments you make will be automatically retained within the design.

23.2. Workflow Steps

After creating a Workflow design (see “Creating A Workflow” on page 399) the *Workflow Designs* pane opens and displays a Start and an End Icon.



Left-clicking on the Start icon changes it from grey to orange, indicating that the Step is active and the Workflow selections can be added or edited.



Note: The default setting creates a *Start* and an *End* Icon. Should further Steps be needed, they can be added to the Workflow, see "Add Step" on page 403 for further details.

23.2.1. Start Step And New Step Selections

Note: An *End* Step selection differs from those detailed below. For details of *End* Step selections see "End Step Selections" on page 402.

A *Start* Step and a new Step contain the following selections:

- *Step name.* This must be a unique name for the Step.
- *Description*. This is an optional field that should provide an explanation of the Step. It will not be shown anywhere other than in the Workflow designer and is for information purposes only.
- *Show feedback to all participants*. If this is selected, participants can view feedback (mark-up) made to the documents by other users after they have performed an Action.
- *Duration*. Enter the length of time you would like this Step to be completed in. Once this limit is exceeded, overrun notifications will be sent to the Owners of the documents being reviewed in the Workflow. Reminder notifications will also be sent to users until the document is forwarded to the next Step.
- *Send notifications.* Select this option if you want all participants who can perform an Action from this Step to be notified when this Step is reached. When cleared, no notification message will be sent.

- *Notification message.* The message you enter in the text box will be added to the notification email and allows you to enter additional instructions to the participants of the Workflow.
- *Send reminders*. Select this option if you want to send reminder emails to the participants of this Workflow. Reminders will only be sent to participants who have not yet performed an Action for this Step. If the Step moves to the next Action, the reminder message ceases. If however, one or more participant comply with the Action, the participants will continue to receive reminders until all other participants complete the Action. When the check box is clear, a notification message is not sent.
- *Reminder frequency.* Determines how often reminder emails are sent. Select how often you would like to send out reminder notification emails to the participants of this Workflow. This will send an email to all participants once the Workflow has been in this Step for the configured time and will continue to send emails at the schedule time until this Step has been completed. Reminders will continue to be sent even after the duration has expired. The duration can be specified in days, weeks or months. A month is defined as four weeks (28 days).
- *Reminder message.* This text box allows a message to be included in the email reminder message.
- *Notify owners on overrun*. Select this option if you want to send notifications to the Owners of any documents using this Workflow when this Step exceeds the configured duration. When the check box is clear, a notification message is not be sent.
- *Overrun notification frequency.* Select how often you would like to send out overrun notifications to document Owners once the duration has been exceeded for this Step. This can be specified in days, weeks or months. A month is defined as four weeks (28 days).
- *Overrun notification message.* The message you enter in the text box will be added to the overrun notification email and allows you to give additional information to document Owners.
- *Notify owners.* Select this option if you want to send a notification message to the document Owners when reaching this Step. When the check box is clear, a notification message is not sent.
- *Owner notification message.* This message entered in the text box will be added to the email and sent to document Owners when reaching this Step.

23.2.2. End Step Selections

An *End* Step only contains the following selections:

- *Step name*. Enter a title for this Step. This will be displayed when viewing the history of any Workflows.
- *Description.* Enter a description for the Step. This will not be shown anywhere other than this designer and is for informational purposes only.
- *Notify owners.* Select this option if you want to send a notification message to the document Owners when reaching this Step. When the check box is clear, a notification message is not sent.
- *Owner notification message.* This message entered in the text box will be added to the email and sent to document Owners when reaching this Step.

The functionality of the end Step selections is the same as those described in "Start Step And New Step Selections" on page 401.

Note: There must always be an *End* Step in a *Workflow*.

23.2.3. Add Step

Clicking the *Add step* button at the bottom of the pane will create another Step in the Workflow designer pane.

Alternatively, right clicking on an existing Step icon displays a menu where you can chose from one of the following:

- Add Forward Action and Step.
- Add Accept Action and Step.
- Add Reject Action and Step.

The new Step will be named *new step 1* and can be changed manually to a name that better describes the Step, as described in "Start Step And New Step Selections" on page 401.

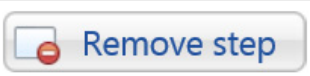
The available selections in the added Step are identical to those described in "Workflow Steps" on page 400.

23.2.4. Delete Step

You can only delete a Step if there are more than two in the Workflow.

To delete a Step, click on the Step icon in the Workflow designs pane to make it active.

Click on the *Remove step* button at the bottom of the screen to remove the Step.



23.3. Workflow Actions

23.3.1. Action Types

There are three types of Actions that can be created in a Workflow:

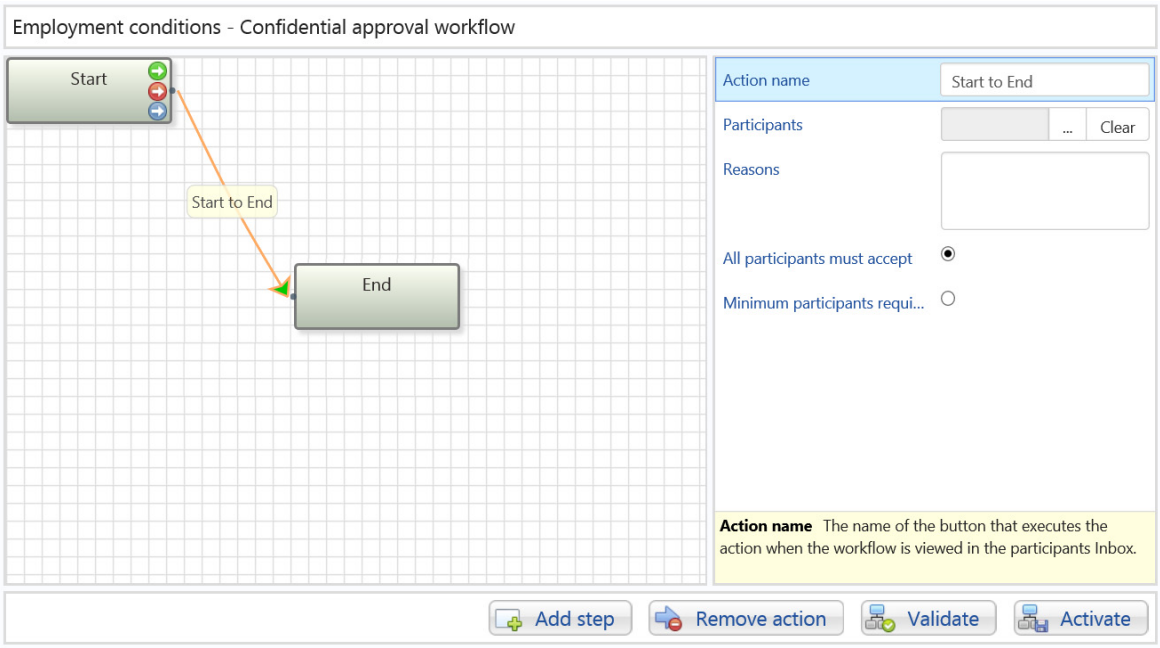
- *Accept.*
- *Reject.*
- *Forward.*

The Action types can be selected by choosing the appropriate coloured arrow from the Step icon in the Workflow designer:

- Green arrow icon = creates an *Accept* Action.
- Red arrow icon = creates a *Reject* Action.
- Blue arrow icon = creates a *Forward* Action.

Note: An Action cannot be created from an End Step, consequently if there are any outbound actions from an End Step the Workflow will display a validation error when trying to activate it.

Left-click on the required Action arrow and drag the mouse cursor to the desired Step icon to create the Action.



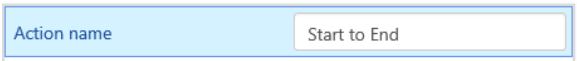
Clicking on the Action icon in the Workflow designs pane displays the Action options in the right pane. The Action is automatically named when it is created.

If one of the connecting Step names is subsequently changed the Action name will not update automatically and must be manually changed in the Action name field with the new name. Similarly, if an Action is connected to a different Step to the one it was originally linked to, its' name must be manually changed to match the new Step name.

23.3.2. Common Action Options

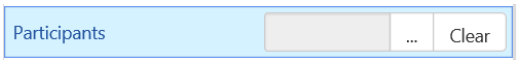
The options common to the Accept, Reject and Forward Actions are:

- Action Name.



The name of the Action when the Workflow is viewed in the participants Inbox. This field is required, but does not need to be unique for this Action.

- Participants.



Choose the participants that will be allowed to execute the action.

Selecting the ... icon launches a popup window to choose the desired participants. This is a list of *Users* (With similar functionality to "Recipient Lists") that are permitted to review the Action.

To remove the participants from the list select *Clear*.

For forward Actions, any one of the defined parties can review the Action.

Note: The Recipients List does not display any lists that were created within a Workflow, Therefore it is not possible to have a *Participants* list that contains a *Recipient* list or vice-versa.

- Reasons.

This text box allows you to enter reasons for the action.

If a choice of reasons is required, the text must be separated by hard return, so that the reviewer can select from a drop-down box, when executing the action.

23.3.3. Accept Action Options

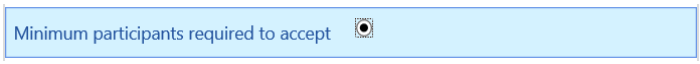
There are two available Accept Action options to choose from, either:

- All participants must accept.

With this option selected, the Action will only be performed once all participants have accepted.

Or:

- Minimum participants required to accept.



With this option selected, you can specify the minimum number of approvers that are required for this action to be performed.

There must be a minimum of one approver defined for the Action to validate.

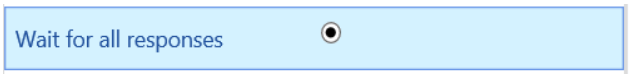
23.3.4. Reject Action Options

The Reject Action options are:

- Reject immediately.

If this option is set, then this Action will be performed as soon as any participant chooses this Reject action.

- Wait for all responses.



If this option is selected and one user rejects, then this Action will always be performed, but not until all participants have selected an Action. This allows other participants to still leave comments.

Note: If the Workflow contains a *Reject* Action, there must also be an *Accept* Action for it to validate and activate.

23.3.5. Forward Action Options

The Forward Action options are:

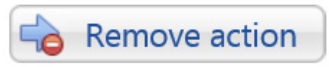
- Allow new revision.

With this option selected it allows one of the reviewers to create a new revision of one or more documents in the review while performing the action.

23.3.6. Delete Action

To delete an Action, left click on the Action icon in the Workflow designer to make the Action active.

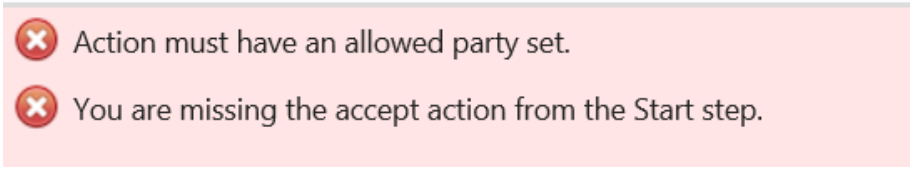
Click on the *Remove action* button at the bottom of the screen to remove the Action.



23.4. Validate Workflow Design

Left-clicking on the *Validate* button will authenticate the document approval flow.

If the approval flow fails validation, the reasons for failure are listed in a red dialogue at the bottom of the pane. Left-clicking on the red failure message highlights the selections that require attention. The pane will close once all the errors have been rectified and the *Validate* button is selected again.



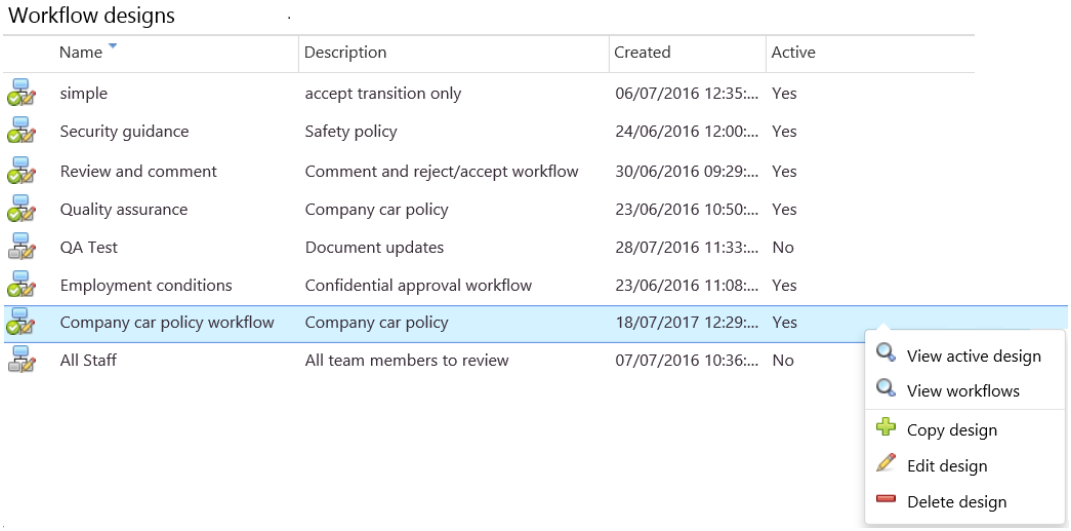
23.5. Activate Workflow

When all Workflow Steps and Actions are complete and *Validate* is error free, the Workflow design can be initiated by selecting the *Activate* button.

Note: If there are validation errors when activating a Workflow, it is not possible to activate the Workflow until the errors are corrected. A validation error will be displayed, see "Validate Workflow Design".

23.6. Viewing, Copying, Editing, Deleting And Deactivating Workflow Designs

In the Workflow Designs pane, there are a selection of menu options available. Select the desired Workflow and right click on the Workflow, then click to display the drop down menu of the available options.



The following options are available in the drop down menu:

23.6.1. View Active Design

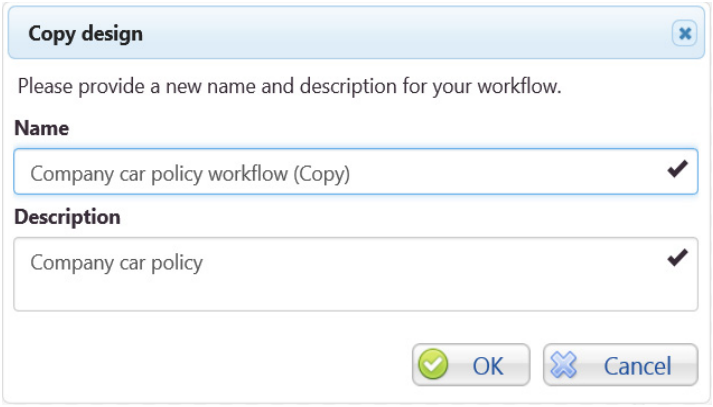
Selecting *View active design* opens the Review and Approval Workflows design pane in read only mode. From this view you can see the design of the Workflow but you cannot make any changes.

23.6.2. View Workflows

Selecting *View workflows* opens the Review and Approval Workflows menu where completed, cancelled and running reviews and approvals can be reviewed see “Workflows” on page 412.

23.6.3. Copy Design

Selecting *Copy design* opens the Workflow copy design dialog where the chosen Workflow can be copied. This dialog lets you edit the name and description of the copied Workflow.



The tick marks indicate the field has valid text. An X indicates the field is empty and the copy cannot be completed until text has been entered.

Note: If you choose not to change the name of the Workflow, PolicyHub will automatically save the Workflow name with the suffix *(Copy)*.

Selecting OK will save the copied Workflow in the Workflow design pane, as a non-active copy of the chosen Workflow.

Note: It is not possible to save a copied Workflow with the same name as the original Workflow.

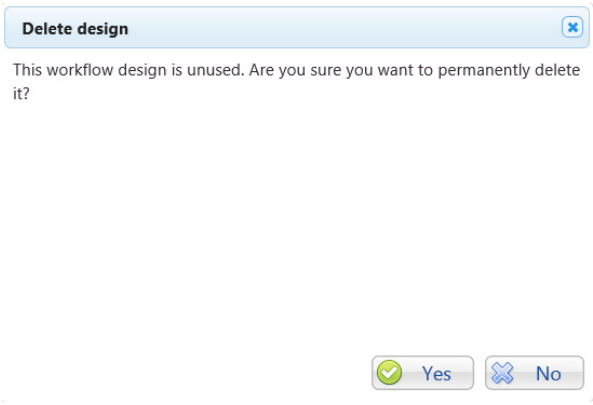
Selecting *Cancel* will return you to the Workflow designs pane and will not save a copy of the Workflow.

23.6.4. Edit Design

Selecting the *Edit design* option opens the Workflow design menu where Actions and Steps can be changed, see “Creating A Workflow” on page 399.

23.6.5. Delete Design

If the Workflow has not been activated, the *Delete design* option appears in the drop down menu. Selecting *Delete design* generates the following message:

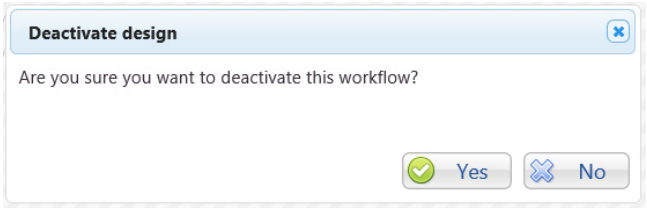


- Selecting the *Yes* button will delete the Workflow.
- Selecting the *No* button will return you to the Workflow designs pane.

Note: The *Delete* selection is not available if the Workflow has been started from the library menu. In this circumstance the menu will display the *Deactivate* option.

23.6.6. Deactivate Design

- If the Workflow has been activated, the *Deactivate* option appears in menu. Selecting *Deactivate* generates the following message:



- Selecting *Yes* will deactivate the Workflow.
- Selecting *No* will return to the Review and Approval pane.

Note: The *Deactivate* selection is not available if the Workflow has not been started from the library menu. In this case the menu will display the *Delete* option.

23.7. Workflow Design Terms

The column headings and selections for "Workflow Designs" are described in Table 92 below.

TABLE 92. Workflow Designs

Term	Meaning / Description
Name	The title of the Workflow.
Description	The Workflow description.
Created	The date the Workflow was created.
Active	The status of the Workflow.
Create new workflow	Creates a new Workflow.
Save	Saves a new Workflow.
View active design	Opens the Review and Approval Workflows designer pane.
View workflows	Opens the Review and Approval Workflows pane.
Copy design	Copies an existing Workflow
Edit design	Edits a Workflow.
Delete design	Deletes an inactive Workflow.
Deactivate design	Deactivates an active Workflow.

23.8. Workflow Icons

Icons are used in Workflow Designs to indicate the status and settings for the Workflow. The icons are described in Table 93.

TABLE 93. Icons

Icon	Description
	Activate a Workflow design.
	Add a Step.
	Create a new Workflow design.
	Copy an existing Workflow design.
	Deactivate a Workflow design.
	Delete a Workflow design.
	Edit a Workflow.
	Indicates a Workflow has been cancelled.
	Indicates a Workflow is active.

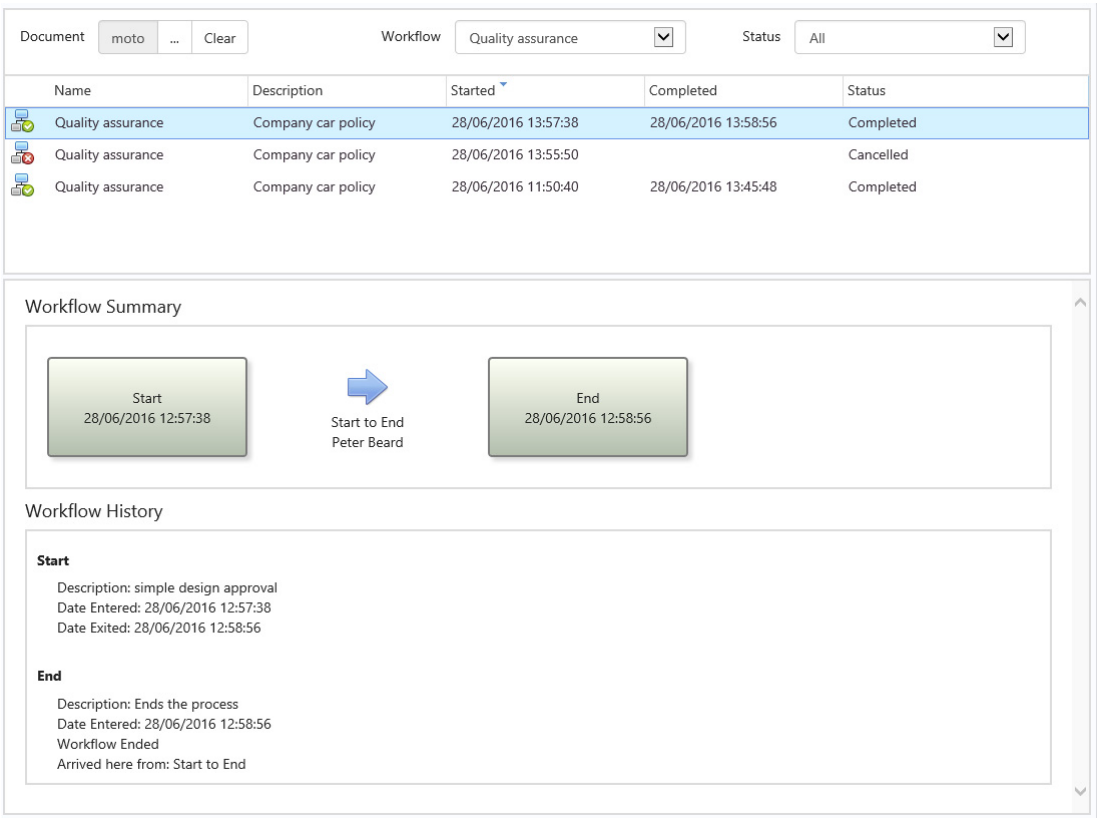
TABLE 93. Icons

Icon	Description
	Indicates a Workflow is in progress.
	Indicates a Workflow is not active.
	Remove a Step.
	Validate a Workflow design.

24. Workflows

You can view in-progress, completed, and cancelled document approvals, together with running reviews and Workflows designs from the *Workflows* menu.

Note: *Workflows* are available depending on your PolicyHub system licence.



24.1. Workflow Selection

There are three filters that can be selected to view a Workflow; *Document*, *Workflow* and *Status,* as described below.

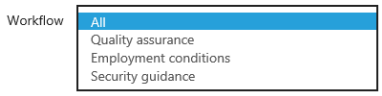
24.1.1. Document

1. Select the ... icon in the document filter. This opens a view of the PolicyHub library where the documents are stored. See “Library” on page 93 for a full description of the library options and how to select a document.
2. Select the document whose Workflow you wish to review and click the *Select* button at the bottom of the screen.
3. Selecting the *Cancel* button will return you to the Workflow menu.
4. Selecting the *Clear* filter removes all the filters from the document selection and displays all Workflow conditions in the Workflow pane.

24.1.2. Workflow

1. Activated Workflow designs can be selected and viewed using the Workflow filter. The default setting for Workflow is *All*.

2. Selecting the Workflow drop-down list displays all the activated Workflow designs.



24.1.3. Status

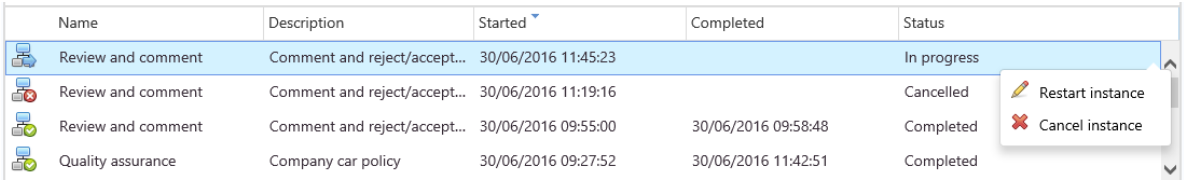
1. Activated Workflow statuses can be viewed and selected with this option. There are three statuses; *In Progress, Completed* and *Cancelled*.

2. Selecting the Status drop-down list lets you choose each of the Workflow statuses. The default setting is *In progress*.

3. Each Workflow design status can be selected individually or all statuses can be selected, as shown in the example above.

24.1.4. Viewing Workflow Statuses

The Workflow pane displays the Workflows selected using the filters described in "Document", "Workflow" and "Status" above.



1. The list of Workflows can be sorted by any of the columns by clicking on the column title. The sort can be reversed by clicking on the column title again.
2. The icons displayed at the left of the Name column indicate the status of each Workflow. See "Workflow Icons" on page 410 for a comprehensive list of all icons used in Workflows.

The descriptions for the Workflow column headings are given in Table 94.

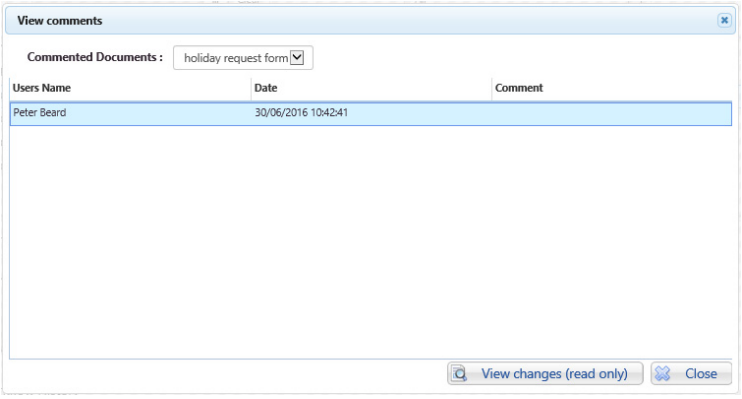
TABLE 94. Workflow

Term	Meaning / Description
Name	The title of the Workflow
Description	The Workflow description.
Started	The date the Workflow started.
Completed	The date the Workflow completed.
Status	The status of the Workflow.

24.2. Workflow Summary

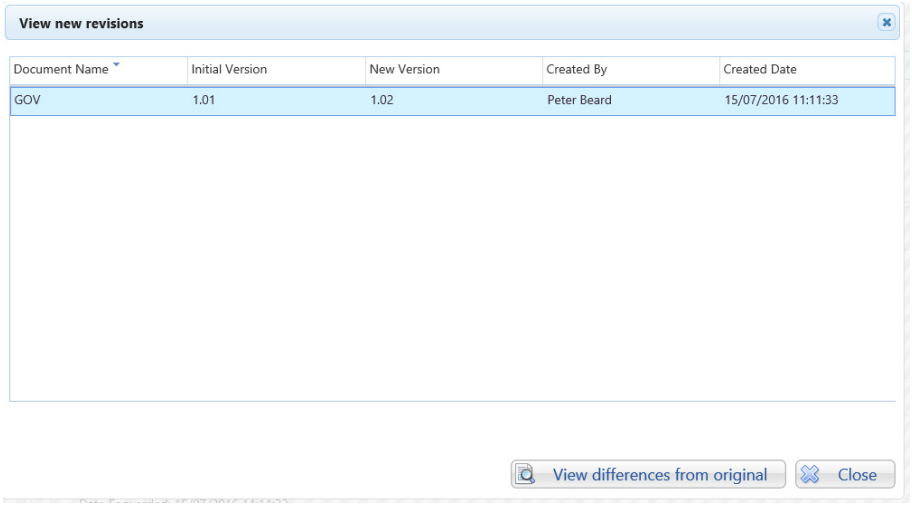
The Workflow summary pane displays owner and step change history status. It provides a visual indication of the Workflow state together with the date and times when steps are triggered and is useful for monitoring and auditing Workflows.

1. Where a step has been forwarded with comments, the Workflow summary pane displays an information icon signifying that comments have been made to the document.
2. Selecting the information icon opens the *View comments* pop-up with details of the recipients who made the comments.



3. The *View comments* pop-up contains the following information:
   - Commented documents - The name of the document.
   - Users - lists all users who have forwarded the document to the next step.
   - Date - lists the date and time the user forwarded the document to the next step.
   - Comment - lists any comments the users made.
4. To view the comments in the document, select the *View changes (read only)* button at the bottom of the pop-up. The document will open in read only mode. Select the *Close* button to close the pop-up.

5. When a step forwards to the next step in the Workflow, a coloured arrows indicates the action that moved it:
   - A blue arrow indicates the action has been forwarded to the next step.
   - A green arrow indicates the action has been accepted.
   - A red arrow indicates the action has been rejected.
6. Where a simple forward step has been reviewed and changes have been made to a document, the reviewer is given the option to save the changes and create a new version of the document. In this instance the Workflow summary pane displays a gold star icon signifying that a new version of the document has been created and a new version number have been made to the document.
7. Selecting the gold star icon opens the *View new revisions* popup window.



The *View new revisions* window displays the following information:

- *Document Name* - the name of the document that was sent for review.
- *Initial Version* - the version number of the document that was sent for review.
- *New Version* - the new version number of the document created after the review.
- *Created By* - the person who reviewed and made changes to the document.
- *Created Date* - the date and time that the new document version number was created.

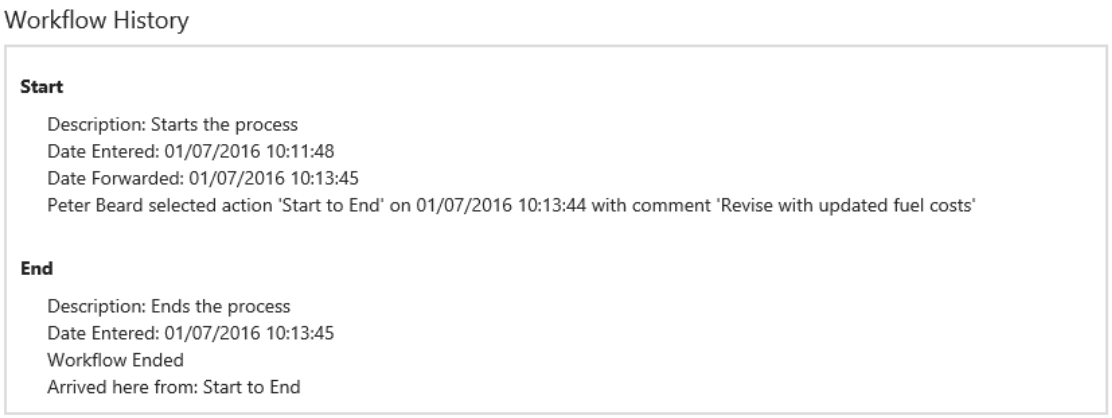
Selecting the *View differences from original* button lets you to compare differences between the original document sent for review and the new version of the document.

Note: The *View differences from original* function is only active with editable Word .doc and .docx documents.

Selecting the *Close* button takes you back to *Workflow Summary* pane.

24.3. Workflow History

The Workflow history pane provides a full record of every action and step made in the review process.

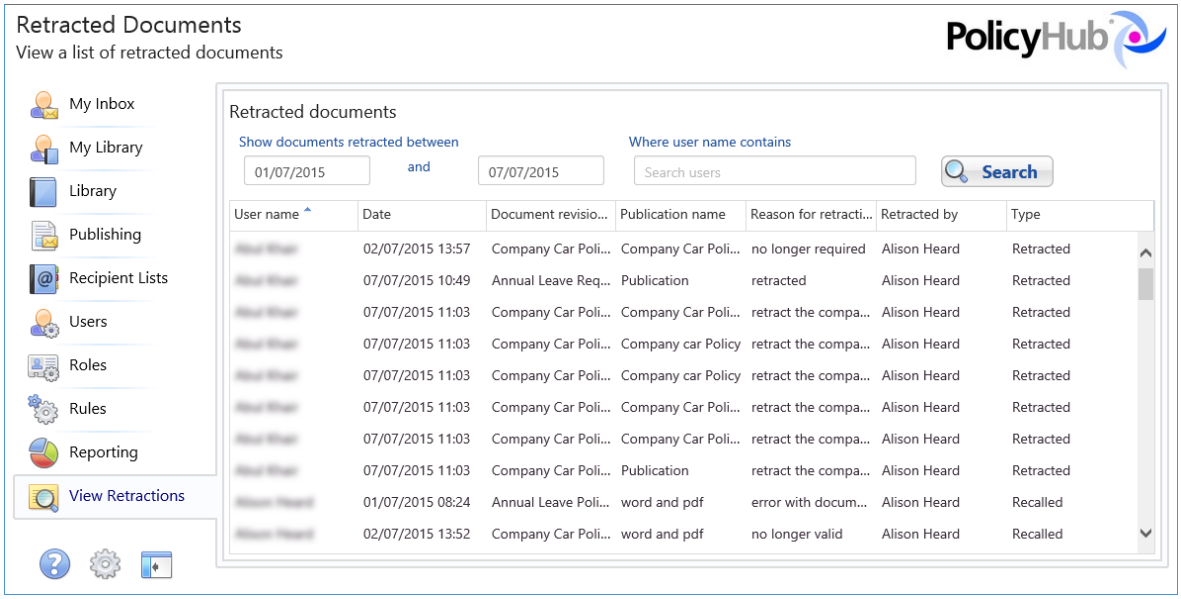


The Workflow history pane displays a complete tracking record of all steps with details of:

- The description.
- The date and time a step was entered, forwarded or ended.
- The comments made to the document.
- How the step was arrived at.

25. View Retractions

The Retracted Documents page is used to display the list of Documents retracted and recalled from user Inboxes and libraries.



25.1. Searching For Retracted And Recalled Documents

Click in the first date box and select the start date for the search period from the calendar. Click in the second date box and select the end date for the search period from the calendar. To search for a single day, enter the same date in both search boxes. Click *Search*.

Note: You must enter dates in both date boxes before starting the search.

The documents which have been retracted or recalled are listed against each User who had the Document removed from their Inbox or library.

The information displayed on the *Retracted Documents* page is described in Table 95.

TABLE 95. Retracted Documents

Item	Description
User name	The name of a User who has had the document revision retracted or recalled from their Inbox or library.
Date	The date and time the document revision was retracted or recalled from the User's Inbox or library.
Document revision description	The revision description of the document which was retracted or recalled.
Publication name	The name of the Publication with which this document revision was published.
Reason for retraction	The reason given for the document revision being retracted or recalled.

TABLE 95. Retracted Documents

Item	Description
Retracted by	The name of the User who retracted or recalled the Document revision.
Type	Retracted – the document revision was retracted from the user's Inbox or library. Recalled – the document revision was recalled from the user's Inbox or library.

The list of retracted and recalled Documents can be sorted by any of the columns by clicking on the column title. The sort can be reversed by clicking on the column header again.

25.2. Filtering Search Results By User

To show only those Document revisions which were retracted or recalled from a specific User's library, enter the text you want to be present in the *User name*. The list of retracted and recalled Documents is filtered and only those Documents removed from Users matching the text in the filter box are displayed.

The text in the *Where user name contains* box will match a user name if the text is found (exactly as typed) anywhere in the *User name*.

For example, if the letter *a* is entered in the filter text box, only those Documents which were retracted or recalled between the specified dates from User accounts which have an *a* anywhere in either their first name or their surname will be displayed.

Additional Information

The following chapters provide additional information which will be used by advanced users. An Index is also provided.

26. Searching Exception List

Note: You can search through your PolicyHub library for any words, *except for words on the exception list*.

The following rules apply to all searches.

- Search queries are *not case sensitive*.
- You can search for any word, *except for words on the exception list*.

Note: If the search criteria is blank, after removing all exception list words and invalid characters, you will be presented with an error message stating that the search needs more information.

26.1. Word Exception List

TABLE 96. Word Exception List

about	can	how	of	the	were
after	come	if	on	their	what
all	could	in	only	them	when
also	did	into	or	then	where
an	do	is	other	there	which
and	does	it	our	these	while
another	each	its	out	they	who
any	else	just	over	this	will
are	for	like	re	those	with
as	from	make	said	through	would
at	get	many	same	to	you
be	got	me	see	too	your
because	has	might	since	under	a b c d e
been	had	more	should	up	f g h i j
before	he	most	so	use	k l m n o
being	have	much	some	very	p q r s t
between	her	must	still	want	u v w x y
both	here	my	such	was	z $
but	him	never	take	way	1 2 3 4 5
by	himself	no	than	we	6 7 8 9 0
came	his	now	that	well	

27. About Anonymous Questionnaires

Anonymous *Questionnaires* cannot form part of Corporate Compliance because there is no known person to fulfil the Corporate Compliance requirements.

Additional publishing options, along with publishing and reporting restrictions also apply to anonymous *Questionnaires* to help maintain recipients' and respondents' anonymity.

27.1. Publishing (Distribution) Options

There are three publishing options available to *Questionnaire* publishers in PolicyHub, the *Standard* option and two anonymous options.

- Standard (Not anonymous)
- Anonymous
- Optionally anonymous.

27.1.1. Standard (Not Anonymous)

With the standard option, recipients respond to a *Questionnaire* with no anonymity – that is, all of their questions and answers can be viewed and reported on fully.

This does not affect any existing reporting functionality and it can be used as a part of the Corporate Compliance requirement.

27.1.2. Anonymous

With this option, *Questionnaire* publishers can select (at publication set-up) to distribute *Questionnaires* which can be answered anonymously by recipients.

Upon receipt of an anonymous *Questionnaire*, the recipient can choose to *not respond* to the *Questionnaire* by rejecting it, or ignoring it and letting it time out.

Upon completion of an anonymous *Questionnaire*, the respondent can only submit the *Questionnaire* by selecting the *Submit Anonymously* button.

- This affects the reporting of *Questionnaires*, because, anonymously submitted questions and answers are stored anonymously and the act of rejecting is also stored anonymously. Reporting cannot differentiate between an anonymous submission and a rejection.
- The respondent will not be able to *Save and Exit* the *Questionnaire* as this requires saving the questions and answers to the database.

27.1.3. Optionally Anonymous

With this option, *Questionnaire* publishers can select (at publication set-up) to distribute *Questionnaires* which can be answered anonymously or not, by recipients.

Upon receipt of an optionally anonymous *Questionnaire*, the recipient can choose to *not respond* to the *Questionnaire* by rejecting it, or ignoring it and letting it time out.

Upon completion of an optionally anonymous *Questionnaire*, the respondent can submit the *Questionnaire* by selecting the *Submit Anonymously* button or the *Submit* button.

- This affects the reporting of *Questionnaires*, because, anonymously submitted questions and answers are stored anonymously and the act of rejecting is also stored anonymously. Reporting cannot differentiate between an anonymous submission and a rejection.

- The respondent will not be able to *Save and Exit* the *Questionnaire*, as this requires saving the questions and answers to the database before they have chosen whether or not to submit the *Questionnaire* anonymously.

27.2. Publishing (Distribution) Restrictions

Various publishing restrictions have been included in PolicyHub to ensure recipients' anonymity is maintained.

27.2.1. Restricted Publishing Functionality

To maintain a recipient's anonymity:

- Anonymous and Optionally Anonymous *Questionnaires* cannot be published to one recipient.
- Anonymous and Optionally Anonymous *Questionnaires* cannot be published to a group with only one member.

27.3. Reporting Restrictions

Various reporting restrictions have been included in PolicyHub to ensure recipients' anonymity is maintained.

27.3.1. Restricted Reporting Functionality

To maintain a recipient's anonymity:

- Anonymous *Questionnaires* cannot form part of Corporate Compliance reporting, because, as the *Questionnaires* are anonymous, there can only be reporting on questions and answers.
- Compliance and audit reports will not be available for any publication submitted using the anonymous or optionally anonymous options.
- The *Export to CSV* functionality will only list the individual anonymous *Questionnaire* responses, the respondents will be listed as *Anonymous.*
- The *Questionnaire* summary report will not be able to report on any anonymous *Questionnaire* responses for a single respondent.
- The CSV export report will not be able to export any anonymous *Questionnaire* responses for a single respondent.

27.4. Guaranteeing Anonymity

All publishing and reporting restrictions, in PolicyHub's anonymous *Questionnaire* functionality, are included to ensure all recipients' anonymity is maintained.

27.4.1. Terms And Conditions

Information or statements given in this document concerning the suitability, capacity, or performance of the mentioned anonymous questionnaire functionality cannot be considered binding. However, Mitratech have made all reasonable efforts to ensure that the anonymous questionnaire functionality is adequate and free of material errors and omissions. Mitratech will, if necessary, explain issues which may not be covered by this document.

The anonymous questionnaire functionality has been prepared to be used by professional and properly trained personnel and the customer assumes full responsibility when using it.

Mitratech welcomes customer comments as part of the process of continuous development and improvement of its anonymous questionnaire functionality.

Mitratech's liability for any errors in this anonymous questionnaire functionality is limited to the documentary correction of errors.

In no event will Mitratech be liable for any damages including, without limitation, indirect or consequential damages, or any damages whatsoever arising from use or loss of use of information supplied through or obtained by the manipulation of this questionnaire functionality ether in action of contract, negligence or other tortious action.

Nothing contained herein shall be construed as conferring by implication, estoppel or otherwise any licence or right under any agreement to use this anonymous questionnaire functionality except for the purpose it has been specifically intended. If there is any conflict between these terms and conditions and/or specific terms of use relating to anonymous questionnaire functionality, the latter shall prevail.

If any of these terms and conditions should be determined to be illegal, invalid or otherwise unenforceable by reason of the laws of any state or country in which these terms and conditions are intended to be effective, then to the extent and within the jurisdiction which that term or condition is illegal, invalid or unenforceable, it shall be severed and deleted from this clause and the remaining terms and conditions shall survive, remain in full force and effect and continue to be binding and enforceable.

These terms and conditions shall be governed by and construed in accordance with the laws of Texas.

Disputes arising here from shall be exclusively subject to the jurisdiction of the courts of Travis County, Texas.

28. Glossary

28.1. Recalled & Retracted Definitions

Recalled – a Document or Publication has been removed from the Inboxes and/or the Libraries of the recipient because the item was sent in error.

Retracted – a Document or Publication has been removed from the Inboxes and/or the Libraries of the recipient because the item is no longer relevant.

28.2. Test & Questionnaire Element Definitions

The following sections provide definitions of *Questionnaire* question types and explain the meaning of *Questionnaire* properties.

Branching – (from a *Selection* or *Rating* answer), skips the next question (or series of questions) in the Questionnaire, and directs the respondent to a different set of questions within the same section, or to an entirely different section. For example, if you were about to ask a series of questions related to driving to work and the respondent's previous reply was that they only use public transport to get to work; you might want to skip the *Driving to Work* questions and direct the respondent to the next set of applicable questions.

Compulsory Question – the question *must be included* in a *Test* but *does not have to be answered* to enable the *Test* to be submitted for marking.

Compulsory Section – the section *must be included* in a *Test*.

Input answer – requires the respondent to answer a question using a direct *Input* (i.e. text) or to select a *Date* from the displayed calendar.

Mandatory – a question which *must be answered* to enable the Test or Questionnaire to be submitted for analysis.

Matrix – groups and displays answers that are common to a single Questionnaire question. A matrix is generally viewed as Vertical = Questions, Horizontal = Answers.

Rating scale answer – requires the respondent to select an answer which best describes their circumstances or matches their opinion. For example: Poor, Fair, Average, Good, Excellent.

Score – the number of marks awarded for a correctly answered question. The *Score* is set per question.

Section – contains a set of grouped or related questions.

Selection answer – requires the respondent to select one or more answers from a list of optional answers (also known as multiple choice). The maximum number of multiple choice answers that can be created is limited to 20.

S*tandout* answer – the Questionnaire answer has been assigned to a group which has been specifically selected for further analysis. In reports, Standout answers are displayed with different colours representing different groups.

Test Score – when *Display test score* is set to *Yes*, on completion of the Test, PolicyHub displays the User's overall result as a percentage (%).

28.3. Inbox Definitions

Document – refers to any Document, Template, Test or Questionnaire

Read Document – any document which requires the recipients to confirm they have read the document.

Template – A master file that has predefined page layouts, fonts, margins, and styles, which can be used to create new documents that share the same formatting.

Test – a Test which was created in PolicyHub and which has been sent to Test the recipients knowledge of a subject.

Questionnaire – a Questionnaire which has been created in PolicyHub and which has been sent to gather the opinions of the recipients.

Publication – a set of documents which have been grouped and sent together.

Review Document/Questionnaire/Test – a pre-release Read Document, Questionnaire or Test which has been sent to a review board for comments prior to being published.

Expired Publication – a Publication which was not actioned within the time limits set by the Publisher. A Publication will expire if all the items in the Publication are not actioned by the *Date due*. When a Test and a Read Document are Published together, the *Date due* shows the date by which the *Read Document* must be completed. Once the *Read Document* has been completed, the *Date due* shows the date by which the *Test* must be completed.

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