



USE CASE

Expand Beyond Simply Managing Documents

Integrated policy and procedure management solution that addresses SharePoint® gaps

The Challenge:

The organization implemented SharePoint to manage important documents. However, SharePoint does not support critical policy and procedure steps required by your organization. Despite IT's efforts to customize the system to support automated notifications, document version control, and employee attestations, significant gaps remain. Document owners struggle to track versions as policies are emailed around to reviewers and approvers. Once approved, administrators struggle to know if their employees are accessing the most current version of the policy. And, as regulations change constantly, policies become outdated without the organization realizing it. The process is inefficient and ineffective.

The Solution:

Automated workflow with PolicyTech® ensures all writers and reviewers are looking at the same document. When a new policy is released, relevant employees are automatically sent the new document and prompted to attest or even take a test on the material. The previous version is automatically archived with an audit trail of employee signatures for ad-hoc reporting.



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A System Designed for the GRC Space



Document owner is alerted that a changing regulation may impact a policy. She reviews the template for writers, reviewers and approvers, and then sends it off for legal review.



After legal determines that the policy requires revisions, the document is circulated to the other reviewers and approvers.



Once the new policy has been approved, it is sent to the employees for their signatures and the old version is archived. Through federated search functionality, the employees can easily find the most current document even if they can't recall whether it was saved on SharePoint or PolicyTech.

Benefits

Customized Workflows Ensure Efficiencies

Know when policies and procedures need to be reviewed, and automatically route documents through writers, reviewers and approvers. After vetting with your legal and compliance teams, distribute to affected employees quickly and easily.

Audit-Ready Reporting

Ensure that the right people are seeing the right content at the right time. Audit trails give you a legal record that each person has attested to understand the policy or procedure.

SharePoint Integration with PolicyTech

With federated search, users can search for documents across both PolicyTech and SharePoint. PolicyTech also offers several SharePoint web parts, including document list, task list, favorites, and reports.

Integration with Other Programs to Easily Locate Documents

PolicyTech allows users to search by title, full text, or keyword to find documents in most major document types including Word®, Excel® and PDF.

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NAVEX Global's comprehensive suite of ethics and compliance software, content and services helps organizations protect their people, reputation and bottom line. Trusted by 95 of the FORTUNE 100 and more than 13,000 customers, our solutions are informed by the largest ethics and compliance community in the world.

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