

# Automate Policy Management Workflows

■ Streamline the alignment, production, distribution and attestation of policies



**Policies & Procedures®**  
NAVEX E&C

## The Challenge

Critical policies and procedures needing periodic review are going unnoticed. Multiple versions of policies cause confusion and mistrust of content, and employees may be attesting to outdated versions. Document owners are unsure which reviewers and approvers have completed their tasks. All of this causes delays in document publication as stakeholders and documents get lost in the process.

## The Solution

Integrated workflow in PolicyTech® allows the document owner to assign writers, reviewers and approvers. Each stakeholder is notified when it's their turn to participate in the process, and gives the owner insight into each status change throughout the process. Workflow visibility eliminates the need to track down who is working on a document, and reports can identify bottlenecks to allow for automated escalations where applicable.



## Automate Critical Handoffs

- 1** Document owner is alerted that a critical document requires updates. She reviews the template for writers, reviewers and approvers. The document owner submits the document for review and the reviewers and approvers are all notified by email.
- 2** Users click on a link in the email to access the document. They can choose to accept it as it is or make revisions. All changes are tracked, allowing the owner to make the final changes and incorporate suggestions to the document.
- 3** Once the document has been reviewed and approved, automatic version control ensures that the new policy is accessible to employees and the old version is stored for auditready reporting.

## Benefits



### Customised Workflows Ensure Efficiencies

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



### Version Control

Eliminate duplicate and out of date policy and procedure documents through version control, archiving expired policies, and ensuring your employees are accessing your most current policies and procedures.



### Workflow Reports Provide Insight

Reporting functionality allows overarching administrator(s) to schedule reports to track of all documents in the review process and identify bottlenecks in the process.



### Enhance Accessibility

With a centralised, automated platform, you can be sure that your employees are accessing the most current policies and procedures whether they're at your HQ, another facility, on the road or in the field.