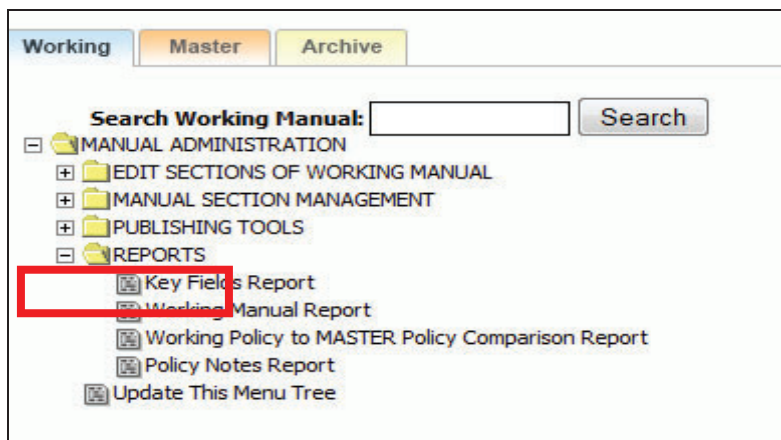


Reports

A series of reports are available to help you better manage your policies. All reports are read only.

To access reports:

1. Click on the “Working Manual” tab at the top left of the screen to make sure you are in the Working Manual.
2. Using the plus signs to the left of each folder, expand the “MANUAL ADMINISTRATION” and the “REPORTS” folders.
3. Click on report you want to review.
4. The report information will appear on the right side of the screen.



Report Features

1. A quick summary of what is included in each report is available in the following section of the User’s Guide.
2. All reports can be viewed on screen or printed.
3. Column headings in any report that show as a link can be clicked to resort the report by that column.

Key Fields Report

- The “Key Fields Report” is a quick view of all the Key Fields in the system and how each has been defined.
- Key Fields that are not defined will show as the key field code (example [7150-1]) in the Current Value column.

Working Manual Report

- The Working Manual Report will show key dates for all of the policies in the Working Manual, including the “Last Saved”, “Revised”, “Reviewed”, “Approved”, “Added to Working from Master” and “Master Revised” dates.
- **Last Saved** is a date stamp from the last time someone clicked “Save” while in the policy. If this date = NONE, then the policy has never been saved since being added to the Working Manual, which indicates that no customization has been done.
- **Revised/Reviewed/Approved** are date fields set at the individual policy level by the policy editor. If the date = NONE, it has not been set or is not being used by the policy editor.
- **Added to Working from Master** is the date the model policy was copied from the Master Manual into the Working Manual. The “Added to Working from Master” date is often reviewed in conjunction with the “Master Revised Date” (see below). If this date = NONE, it indicates that it was added as a unique policy and was not moved to the Working from the Master.
- **Master Revised Date.** This indicates the date of the last revision to the model policy content in the Master Manual. If this date = NONE, it indicates that there is no Master Manual version for this policy number. The “Master Revised Date” can be used in conjunction with the “Last Saved” and “Added to Working from Master” dates to help determine if all updates are included in the policy.

Note: If an organization creates a unique policy with the same policy number as a Master Manual policy, the “Master Revised Date” will still appear as it is based on the policy number, and not the title or the content of the policy.

Working Policy to MASTER Policy Comparison Report

- This report compares the content in all Working Manual policies to the content in the Master Manual. This is based on policy number – if the policy number exists in the Working Manual, the report will compare it to the policy in the Master Manual with the same number.
- This report will simply display if the content matches or not. It does not give any additional information about what the differences are.
- Content that does not match could be the result of customization by the organization, updates to the Master Manual that have not been incorporated into the Working Manual, or a combination of both.
- **Note:** If an organization creates a unique policy with the same policy number as a Master Manual policy, the report will compare it with the Master Manual model policy as it is based on the policy number, and not the title or the content of the policy.
- **Comparison Results** will compare the title of the Working Manual policy to the title of the model policy in the Master Manual, and compare the body of the content. The result will indicate if the policy title matches, and whether or not the content matches. The comparison looks for an exact match, so even if there is one minor difference in the content, the report will indicate that the content does not match.

Working Policy to MASTER Policy Comparison Report (continued)

- **Exists in Master** indicates if the policy number exists and has been assigned to a model policy in the Master Manual. If a unique policy has been added and assigned the same number as a Master policy, this field will indicate that the policy exists in the Master, even if the policies contain different content.
- **Last Saved** is a date stamp from the last time someone clicked “Save” while in the policy. If this date = NONE, then the policy has never been saved since being added to the Working Manual, which indicates that no customization has been done.
- **Master Revised Date**. This indicates the date of the last revision to the model policy content in the Master Manual. If this date = NONE, it indicates that there is no Master Manual version for this policy number. The “Master Revised Date” can be used in conjunction to the “Last Saved” and “Added to Working from Master” dates to help determine if all updates are included in the policy.
- **Added to Working from Master** is the date the model policy was copied from the Master Manual into the Working Manual. “Added to Working from Master” date is often reviewed in conjunction with the “Master Revised Date” (see below). If this date = NONE, it indicates that it was added as a unique policy and was not moved to the Working from the Master.

Policy Notes Report

- The Policy Notes Report will show all editor notes for all policies in the Working Manual.