Access an Assigned Document

You can access a document in the following ways:

In your email application, open the Writing collaboration required message and click the link.

In PolicyTech, click MY TASKS, find the document under Collaborate, and then click the link.

In PolicyTech, click DOCUMENTS, then My Documents, then I Write, and then Collaboration.

Note: The document remains in collaboration status until the last assigned writer clicks Finished Writing. It then returns to draft status, where you can no longer work on it.

Note: If you see the message to the right when you try to open a document, you can choose to have PolicyTech notify you when the document is available, or you can click OK to view the document in read-only mode.

Collaborate on a Document

You can help the document owner and other assigned writers:

Microsoft® Word or Excel® Documents. You can use the full functionality of Word or Excel to write the document.

Insert Properties. You can insert fields that show document properties. Click Editor Tools, then Insert Properties to see what you can insert. Inserted fields are automatically updated as document properties change.

Insert Links. To link to a related document, place the cursor where you want the link inserted, click Links & Attachments, then Insert Link to Existing Document.

Discussions. To start or view a discussion about a document, click the discussion icon in the upper right corner.

Finished Writing. To close the document and continue writing later, click Save and Close. When you’ve completed your writing task, click Finished Writing and follow the prompts. The document owner is notified that you’ve completed your task.