

OP-006 – Using Hyperlinks

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1 Adding Hyperlinks to a Document

When a document is imported into OnPolicy it receives an internal URL (permalink). This can be used as a hyperlink from another document within OnPolicy. When clicked, the hyperlink will open the currently effective version of the target document. If a procedure references a form, you can create a hyperlink in the procedure. When a user clicks the link, the form will open.

Click on the “Documents” tab and click on the target document.

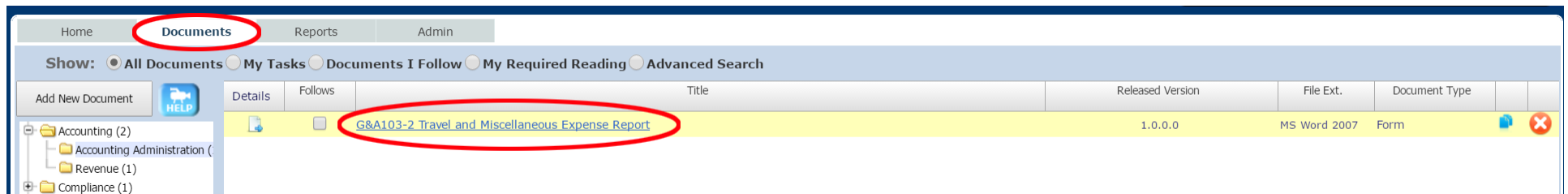


Figure 1



OP-006 – Using Hyperlinks

On the “Document Detail” screen there is a “Released PDF Permalink” field. This is the URL that will be used to link to this document. Release the document to ensure that the hyperlink becomes active. For information on releasing documents see OP-005 Approving and Releasing Documents.

Document Detail

Doc Title: G&A103-2 Travel and Miscellaneous Expense Report

Desc.:

Released Version #: 1.0.0.0 Original File Name: G&A103-2 Travel and Miscell

Release Date: 11/1/17 7:29 PM Current Revision: 1.0.0.0

Intervals: Review: months Retention: months

Department / Group: Accounting Category / Process: Accounting Administration Document Type: Form

Released PDF Permalink: <https://app.onpolicy.com/permalink/doc/212090>

Revisions Permissions Distribution Activity Log Related Docs Misc Info Settings

Submit Draft Accept Review Approve Revision Release Revision

Quick Release Reject Review Reject Revision Obsolete Revision

Revision Nbr	Creation Date	Revision Status	Effective Date
1.0.0.0	11/1/17 7:14 PM	Released	11/01/2017

Figure 2

Note: Only released, currently-effective documents can be reached through the hyperlink function. This ensures that your readers cannot access a document that is in the process of review and approval.



OP-006 – Using Hyperlinks

The URL from the “Released PDF Permalink” field of the target document will be used as your hyperlink when added to the referencing document. Upload the referencing document to OnPolicy. Once the referencing document and the target document have been released, the hyperlink will be active for your readers.

Your readers will now be able to view the referencing document which has the hyperlink, and use the hyperlink to display the target document.

The screenshot displays the Bizmanualz OnPolicy web application. The top navigation bar shows the logo and the text 'Bizmanualz OnPolicy'. The main content area is titled 'G&A103 Travel and Entertainment : Rev Nbr - 1.0.0.0'. The document content is as follows:

- 1.0 TRAVEL ARRANGEMENTS**
 - 1.1 All arrangements required for business travel are to be made through the Travel Coordinator. The
 - 1.2 It is preferable that all employees travel during non-working hours to maximize efficiency.
 - 1.3 **Cash Advances** - To help ensure accurate and timely expense report preparation and reduce the additional paperwork required to process and track Cash Advances, the Company generally discourages cash advances unless special circumstances apply.
- 2.0 EXPENSE GUIDELINES**
 - 2.1 Air Travel - The Travel Coordinator will make airline reservations
 - 2.2 Lodging - The travel coordinator will make lodging arrangements based on value, convenience for the traveler and according with what is usual and customary company guidelines.
 - 2.3 Meals - Employees will generally be responsible for obtaining their own meals while traveling. Meals and miscellaneous sundry items will be reimbursed according to the lesser of actual expenses or \$45.00 per day.
 - 2.4 Car Rentals - Advance arrangements should be made by the Travel Coordinator if a car is required at the destination.
 - 2.5 Personal Vehicles - An employee required to use their own automobile for business will be reimbursed at the prevailing rate per tax guidelines for per-mile deductions.
 - 2.6 Entertainment - In order for entertainment to be a valid deductible entertainment expenses it must be an ordinary and necessary expense directly related or associated with the active conduct of business.
 - 2.9 Non-Reimbursable Expenses - Some expenses are not considered valid business expenses by the company, yet may be incurred for the convenience of the traveling individual.
- 3.0 EXPENSE REPORT PREPARATION AND REIMBURSEMENT**
 - 3.1 All business travel and entertainment expenditures incurred by employees of the Company are reimbursed after the employee submits form [G&A103-2 TRAVEL AND MISCELLANEOUS EXPENSES](#). Complete and submit these forms to your supervisor for approval within two (2) weeks of your return.

At the bottom of the document, there is a footer with the following information:

G&A103 Travel and Entertainment page 1 of 2
Released Revision: 1.0.0.0 Approver: Vallorani, Edward Effective Date: Wed Nov 01 19:59:06 EDT 2017

Figure 3



OP-006 – Using Hyperlinks

Clicking on the hyperlink will bring up the target document.

Bizmanualz OnPolicy

G&A103-2 Travel and Miscellaneous Expense Report : Rev Nbr - 1.0.0.0

Accounting Policies, Procedures and Forms Bizmanualz.com

G&A103-2 TRAVEL AND MISCELLANEOUS EXPENSE REPORT

Name: _____

Purpose of Trip: _____

Dates and Details of Trip: _____

TRAVEL COSTS						LODGING		MEALS		SUPPLIES (Describe Below)	TOTALS
Date	No. of miles	Mileage Reimburse	Parking	Air Travel	Ground (Car/Taxi)	Hotel	Telephone	No.	Amounts		

Figure 4

The original document is still open under the target document. Simply move the top document by clicking and dragging the title bar to show both.

Bizmanualz OnPolicy

G&A103 Travel and Entertainment : Rev Nbr - 1.0.0.0

1.0 TRAVEL ARRANGEMENTS

1.1 All arrangements required for business travel are to be made through the Travel

G&A103-2 Travel and Miscellaneous Expense Report : Rev Nbr - 1.0.0.0

Accounting Policies, Procedures and Forms Bizmanualz.com

G&A103-2 TRAVEL AND MISCELLANEOUS EXPENSE REPORT

Name: _____

Purpose of Trip: _____

Dates and Details of Trip: _____

TRAVEL COSTS						LODGING		MEALS		SUPPLIES (Describe Below)	TOTALS
Date	No. of miles	Mileage Reimburse	Parking	Air Travel	Ground (Car/Taxi)	Hotel	Telephone	No.	Amounts		

Figure 5




OP-006 – Using Hyperlinks

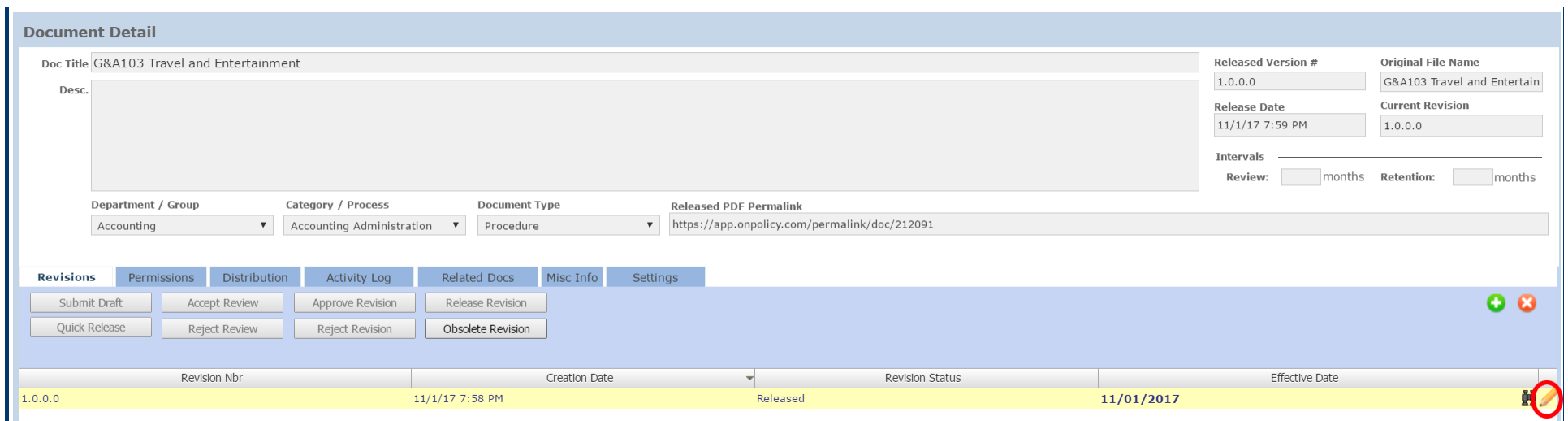
2 Working with New Documents

The target document needs to be imported into OnPolicy before the referencing document. By importing the target document first, a permalink will be generated that can be used by the referencing document. For instructions concerning adding a document to OnPolicy, see OP-004 Adding a Document.

Note: Only released, currently-effective documents can be reached through the hyperlink function. This ensures that your readers cannot access a document that is in the process of review and approval.

3 Working with Existing Documents

Find the permalink for the target document as shown in Figure 2 on page 2. Open the referencing document and click on the pencil  icon of the most current revision.



The screenshot shows the 'Document Detail' page for a document titled 'G&A103 Travel and Entertainment'. The page includes a description field, a release date of 11/1/17 7:59 PM, and a current revision of 1.0.0.0. The document type is 'Procedure' and the released PDF permalink is <https://app.onpolicy.com/permalink/doc/212091>. The page also features a 'Revisions' tab with a table of revisions and a 'Permissions' tab with various action buttons.

Revision Nbr	Creation Date	Revision Status	Effective Date
1.0.0.0	11/1/17 7:58 PM	Released	11/01/2017

Figure 6

OP-006 – Using Hyperlinks

This will open the file for editing. Insert the hyperlink at the appropriate spot in the document and save the file.

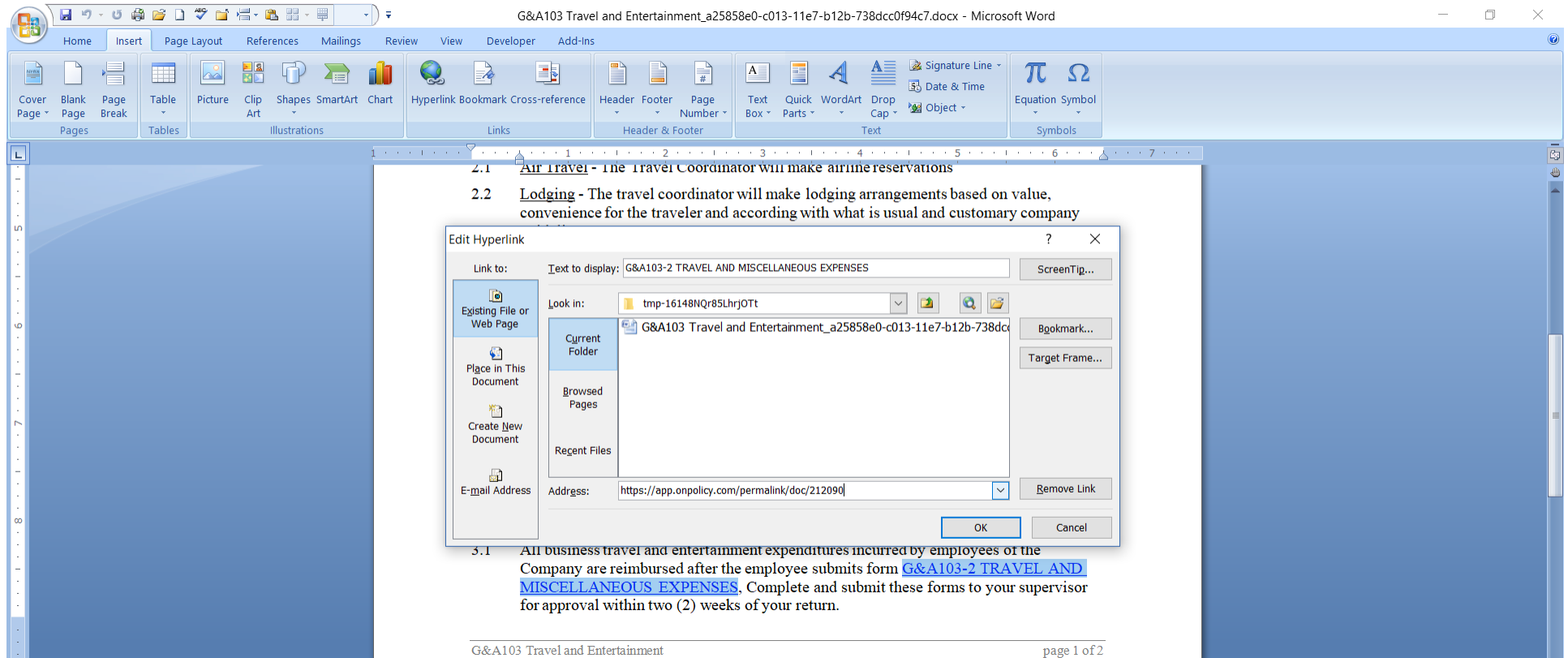


Figure 7



OP-006 – Using Hyperlinks

This will create a new draft of the document. For the document with the hyperlink to be usable by readers, it must be released either through the review, approval and release process or through the quick release process.

Document Detail

Doc Title

G&A103 Travel and Entertainment

Desc.

Released Version #

1.0.0.0

Original File Name

G&A103 Travel and Entertain

Release Date

11/1/17 7:59 PM

Current Revision

1.0.0.0

Intervals

Review:

months

Retention:

months

Department / Group

Accounting

Category / Process

Accounting Administration

Document Type

Procedure

Released PDF Permalink

<https://app.onpolicy.com/permalink/doc/212091>

Revisions

Permissions

Distribution

Activity Log

Related Docs

Misc Info

Settings

Submit Draft

Accept Review

Approve Revision

Release Revision

Quick Release

Reject Review

Reject Revision

Obsolete Revision

Revision Nbr

Creation Date

Revision Status

Effective Date

1.1.0.0

11/2/17 5:23 PM

Draft

1.0.0.0

11/1/17 7:58 PM

Released

11/01/2017

Figure 8

OP-006 – Using Hyperlinks

4 Permalink Report

A new report is available within OnPolicy that will list all of your documents with their permalinks. The report is in the form of a .csv file which can be downloaded from the “Reports” tab of OnPolicy.

Click on the “Reports” tab. In the “Document Work Flow” section click on the down arrow to activate the dropdown menu. The second option in the dropdown menu is the “Document Permalink” report. Click on this option.

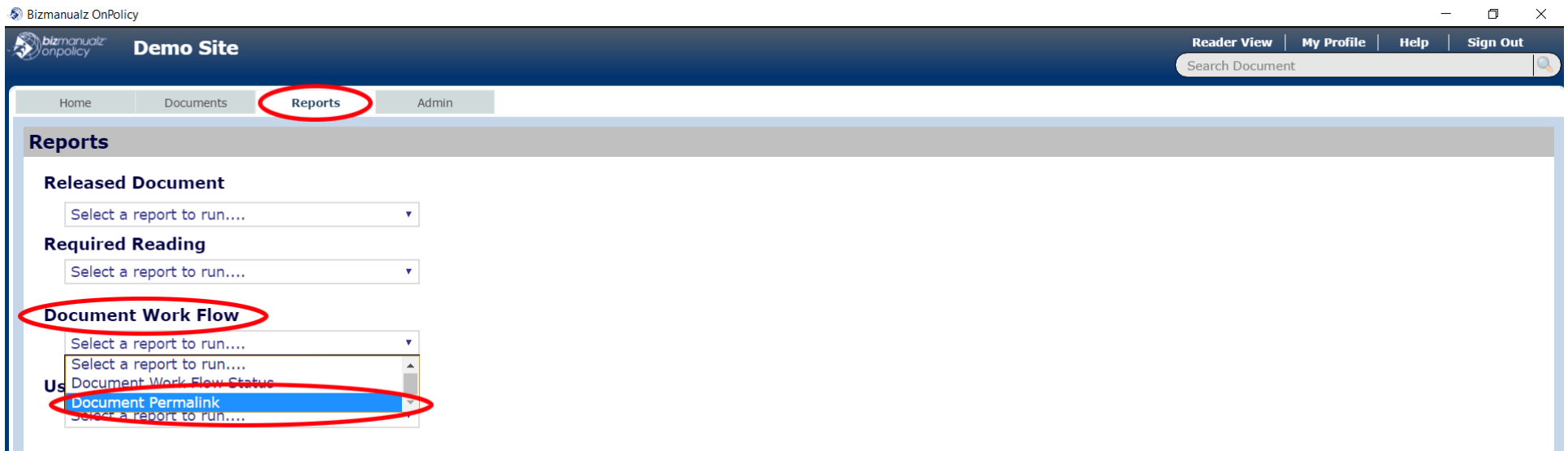
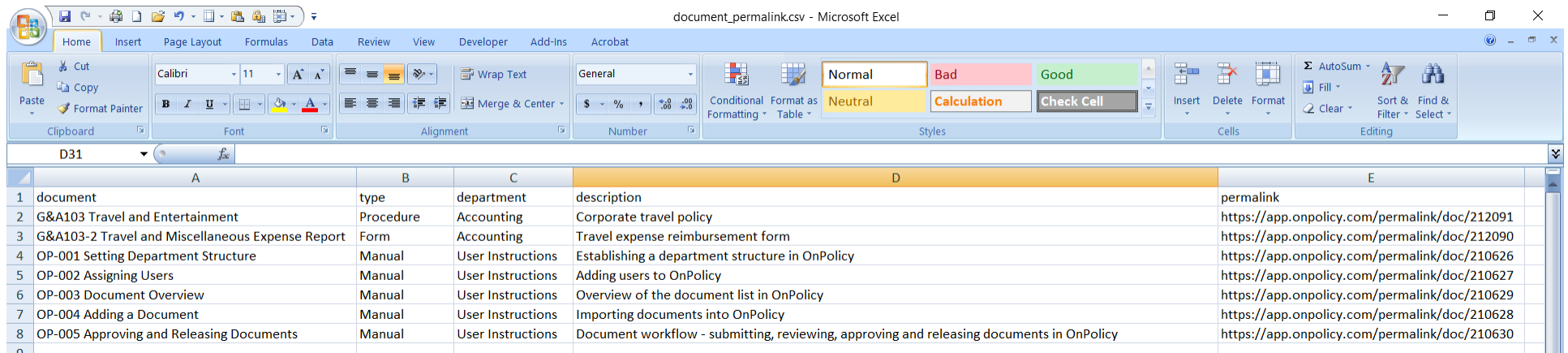


Figure 9

OP-006 – Using Hyperlinks

A dialog box will open that will allow you to save the .csv file in the directory of your choice. Open the downloaded file. The file will list the document name, type of document, department, description and permalink.



	A	B	C	D	E
1	document	type	department	description	permalink
2	G&A103 Travel and Entertainment	Procedure	Accounting	Corporate travel policy	https://app.onpolicy.com/permalink/doc/212091
3	G&A103-2 Travel and Miscellaneous Expense Report	Form	Accounting	Travel expense reimbursement form	https://app.onpolicy.com/permalink/doc/212090
4	OP-001 Setting Department Structure	Manual	User Instructions	Establishing a department structure in OnPolicy	https://app.onpolicy.com/permalink/doc/210626
5	OP-002 Assigning Users	Manual	User Instructions	Adding users to OnPolicy	https://app.onpolicy.com/permalink/doc/210627
6	OP-003 Document Overview	Manual	User Instructions	Overview of the document list in OnPolicy	https://app.onpolicy.com/permalink/doc/210629
7	OP-004 Adding a Document	Manual	User Instructions	Importing documents into OnPolicy	https://app.onpolicy.com/permalink/doc/210628
8	OP-005 Approving and Releasing Documents	Manual	User Instructions	Document workflow - submitting, reviewing, approving and releasing documents in OnPolicy	https://app.onpolicy.com/permalink/doc/210630

Figure 10



OP-006 – Using Hyperlinks

5 Related Docs Screen

The “Related Docs” screen has been updated. You can search for related documents and permanently add them to this screen

Note: This screen is for reference only. Adding documents to this screen does not relate, link or connect these documents in any way within the system.

You can search for related documents by typing part of the name or description of the document in the search field. You can check or uncheck the type, department and description options to control what is displayed on the screen. Click the magnifying glass icon to initiate the search.

Document Detail

Doc Title: G&A103 Travel and Entertainment

Desc.: Corporate travel policy

Released Version #: 1.0.0.0

Original File Name: G&A103 Travel and Entertain

Release Date: 11/1/17 7:59 PM

Current Revision: 1.0.0.0

Intervals: Review: months Retention: months

Department / Group: Accounting

Category / Process: Accounting Administration

Document Type: Procedure

Released PDF Permalink: https://app.onpolicy.com/permalink/doc/212091

Revisions | Permissions | Distribution | Activity Log | **Related Docs** | Misc Info | Settings

G&A103

Search to add new Related Documents. Choose visible fields below.

☒ type ☒ department ☒ description

Document	Document Type	Department	Description	Permalink
----------	---------------	------------	-------------	-----------

Figure 11



OP-006 – Using Hyperlinks

The search will return all of the documents that meet your search criteria. Depending on the options selected the search will return the document name, document type, department, description and permalink.

Note: This is an alternate method to finding the permalink for an existing document.

Bizmanualz OnPolicy

Demo Site Reader View | My Profile | Help | Sign Out

Search Document

Document Detail

Doc Title: G&A103 Travel and Entertainment		Released Version #	Original File Name
Desc.: Corporate travel policy		1.0.0.0	G&A103 Travel and Entertain
		Release Date	Current Revision
		11/1/17 7:59 PM	1.0.0.0
		Intervals	
		Review: <input type="text"/> months	Retention: <input type="text"/> months

Department / Group	Category / Process	Document Type	Released PDF Permalink
Accounting	Accounting Administration	Procedure	https://app.onpolicy.com/permalink/doc/212091

Revisions | Permissions | Distribution | Activity Log | **Related Docs** | Misc Info | Settings

G&A103 Search to add new Related Documents. Choose visible fields below.

☒ type ☒ department ☒ description

Document	Document Type	Department List	Description	Permalink
G&A103-2 Travel and Miscellaneous Expense Repor	Form	Accounting	Travel expense reimbursement form	https://app.onpolicy.com/permalink/doc/212090
G&A103 Travel and Entertainment	Procedure	Accounting	Corporate travel policy	https://app.onpolicy.com/permalink/doc/212091


Current Related Documents

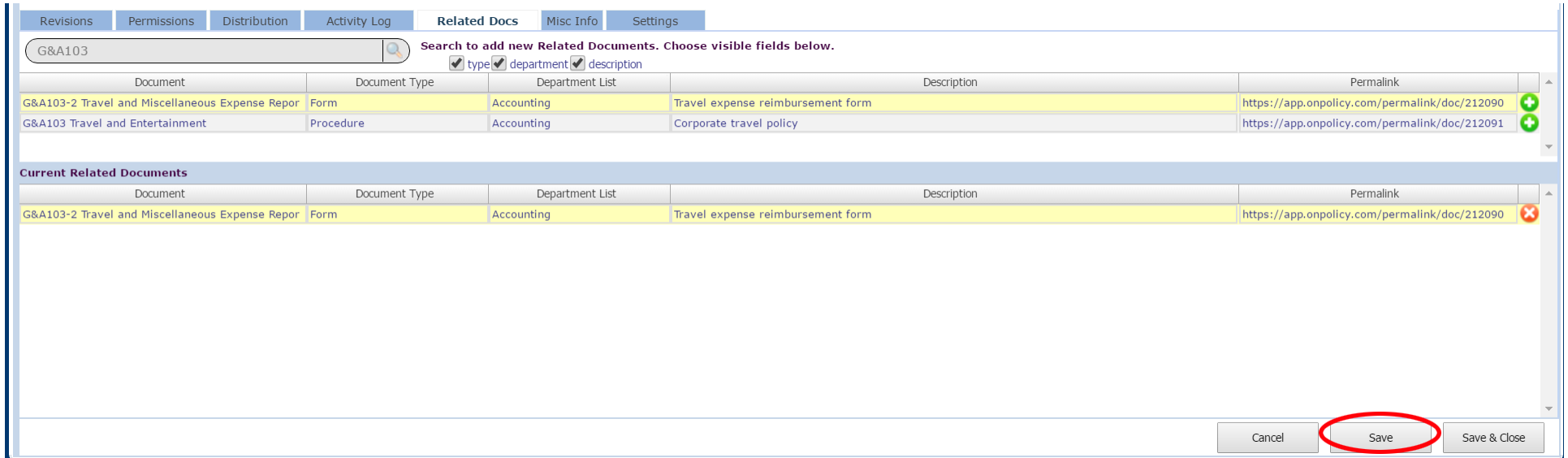
Document	Document Type	Department List	Description	Permalink
----------	---------------	-----------------	-------------	-----------

Figure 12




OP-006 – Using Hyperlinks



Click on the plus  icon to add the selected document to this record. Click “Save” to save the record.




Revisions Permissions Distribution Activity Log **Related Docs** Misc Info Settings

G&A103  Search to add new Related Documents. Choose visible fields below.

☒ type ☒ department ☒ description

Document	Document Type	Department List	Description	Permalink	
G&A103-2 Travel and Miscellaneous Expense Repor	Form	Accounting	Travel expense reimbursement form	https://app.onpolicy.com/permalink/doc/212090	
G&A103 Travel and Entertainment	Procedure	Accounting	Corporate travel policy	https://app.onpolicy.com/permalink/doc/212091	

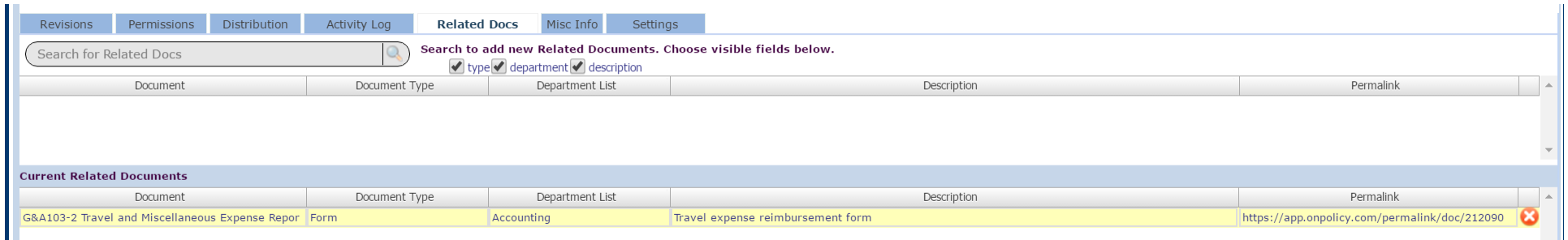
Current Related Documents

Document	Document Type	Department List	Description	Permalink	
G&A103-2 Travel and Miscellaneous Expense Repor	Form	Accounting	Travel expense reimbursement form	https://app.onpolicy.com/permalink/doc/212090	


Cancel **Save** Save & Close

Figure 13

Returning to this screen in the future will show the related document.



Revisions Permissions Distribution Activity Log **Related Docs** Misc Info Settings

Search for Related Docs  Search to add new Related Documents. Choose visible fields below.

☒ type ☒ department ☒ description

Document	Document Type	Department List	Description	Permalink	
----------	---------------	-----------------	-------------	-----------	--

Current Related Documents


Document	Document Type	Department List	Description	Permalink	
G&A103-2 Travel and Miscellaneous Expense Repor	Form	Accounting	Travel expense reimbursement form	https://app.onpolicy.com/permalink/doc/212090	

Figure 14