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.
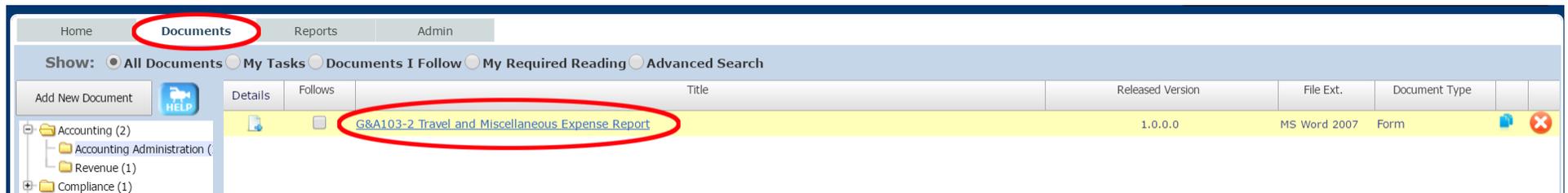
Figure 1

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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.

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.

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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.

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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.

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Figure 3

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Clicking on the hyperlink will bring up the target document.

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.


Figure 5

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.

Figure 6

This will open the file for editing. Insert the hyperlink at the appropriate spot in the document and save the file.
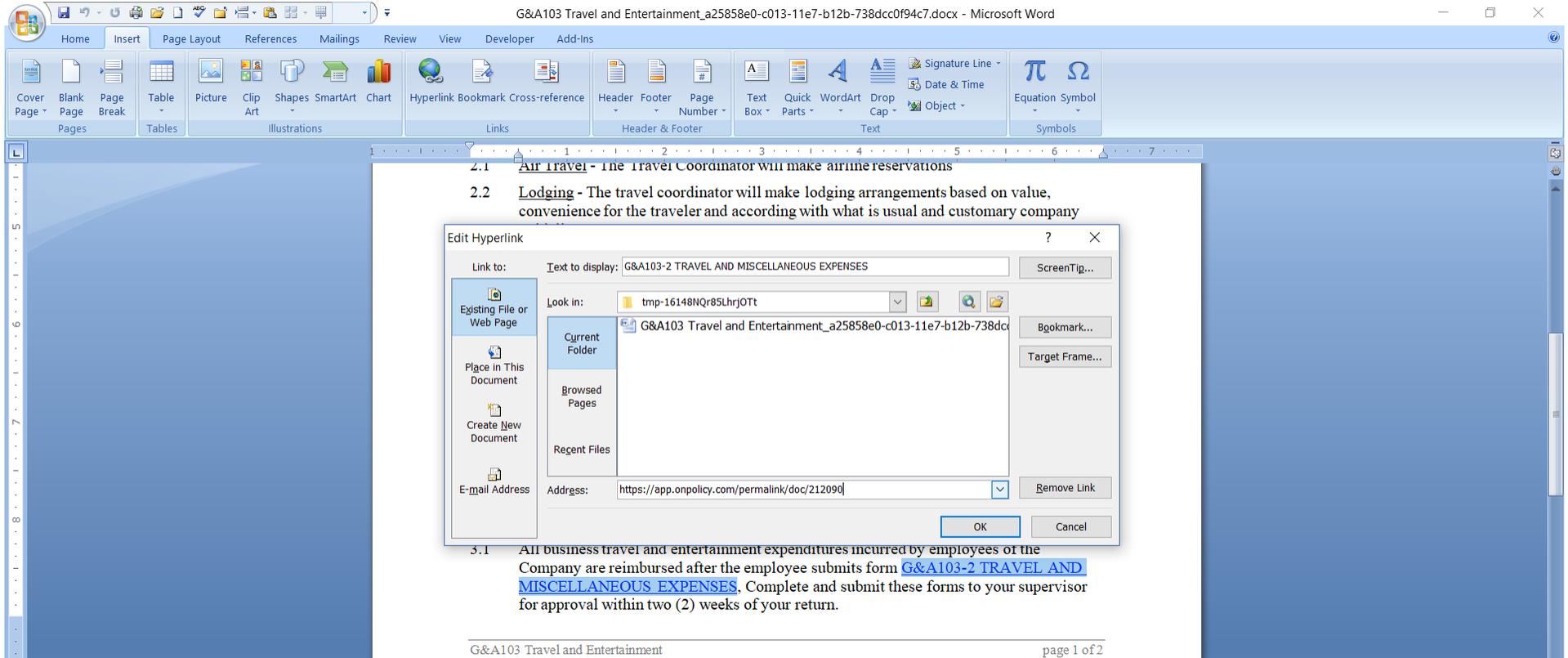
Figure 7

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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.

Figure 8

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.
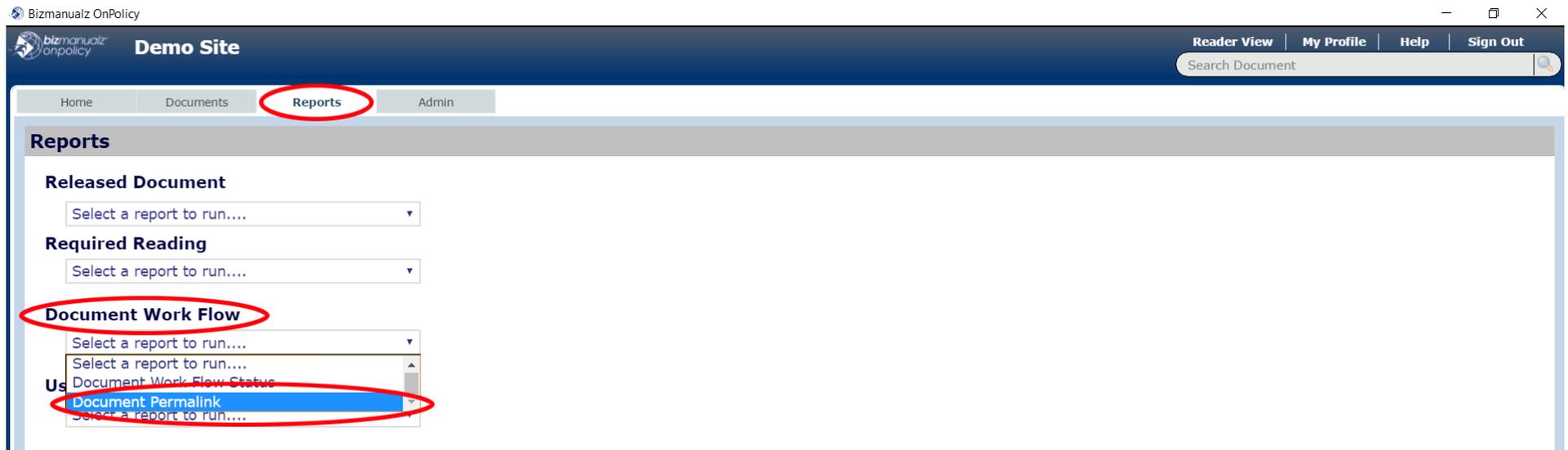
Figure 9

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.

|	document	type	department	description	permalink
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

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.
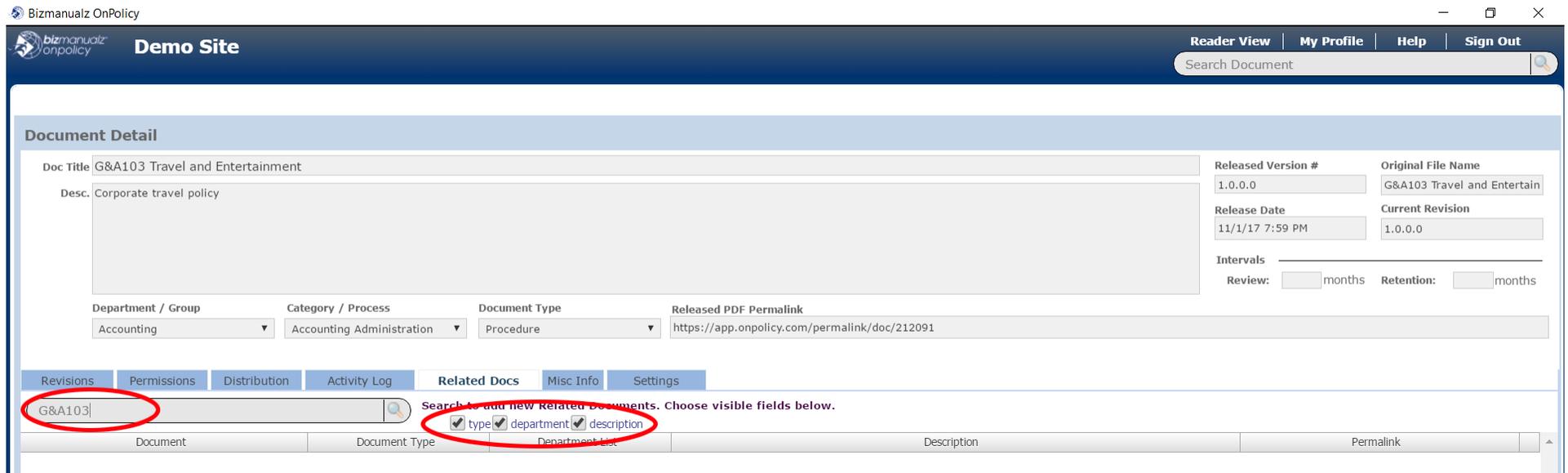
Figure 11

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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.

Figure 12

Click on the plus ⊕ icon to add the selected document to this record. Click "Save" to save the record.

Figure 13

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

Figure 14