

# POLICYTECH HELP: GENERAL USER

This help document covers how to view and browse documents in Yale’s PolicyTech application tool. It is meant for those who need to view current Yale School of Medicine policies, procedures, guidelines, and forms. Note that only users on a Yale IP address are able to view PolicyTech documents.

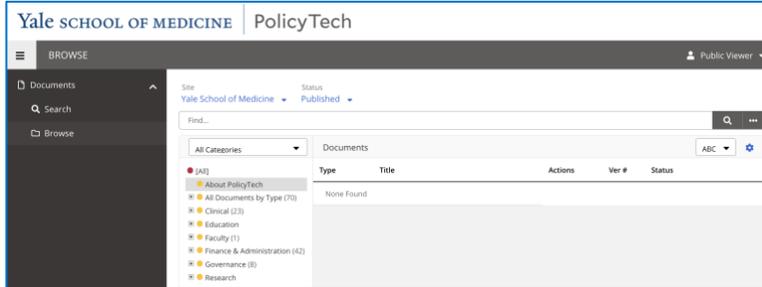
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# OPEN POLICYTECH

Note that only users on a Yale IP address are able to view PolicyTech documents. To view, open [the public view of Yale's PolicyTech application](#).

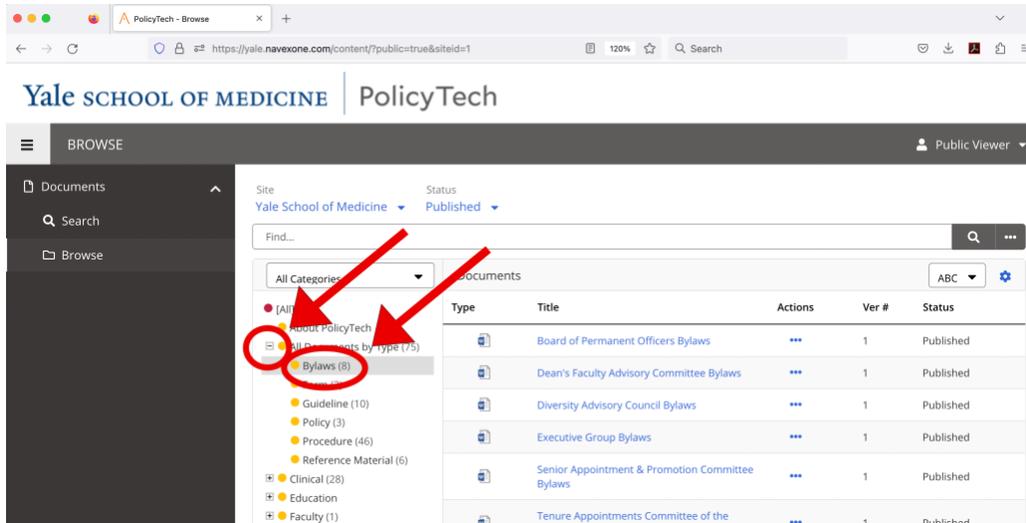
Upon initially launching PolicyTech, you will be directed to the “Browse” page.



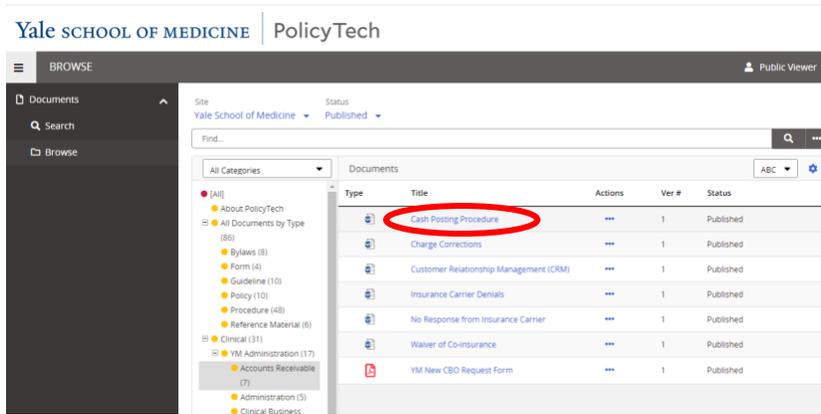
## BROWSE

To Browse the documents in PolicyTech, either click a category label (such as “All Documents by Type”) or click the “plus” sign next to the category label.

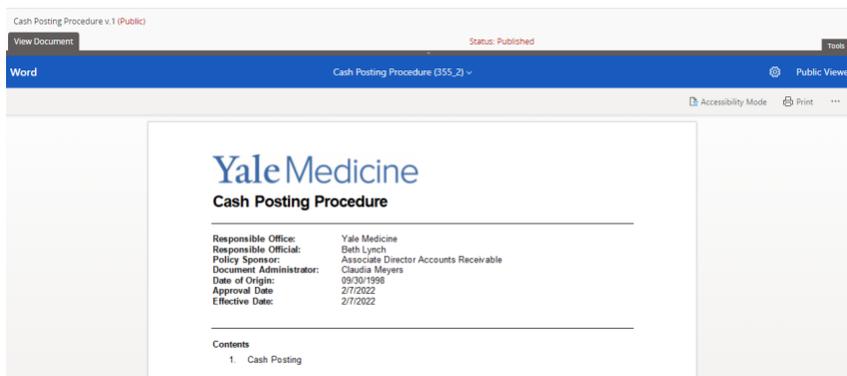
1. Clicking the “plus” sign next to the folder title will open the sub-categories of that category.
2. Clicking the category title will list all documents in that category/folder.



To open a document, select the document from the list displayed in the right panel.



The selected document will open in a new tab.



## SEARCH FOR A DOCUMENT USING “BROWSE” VIEW

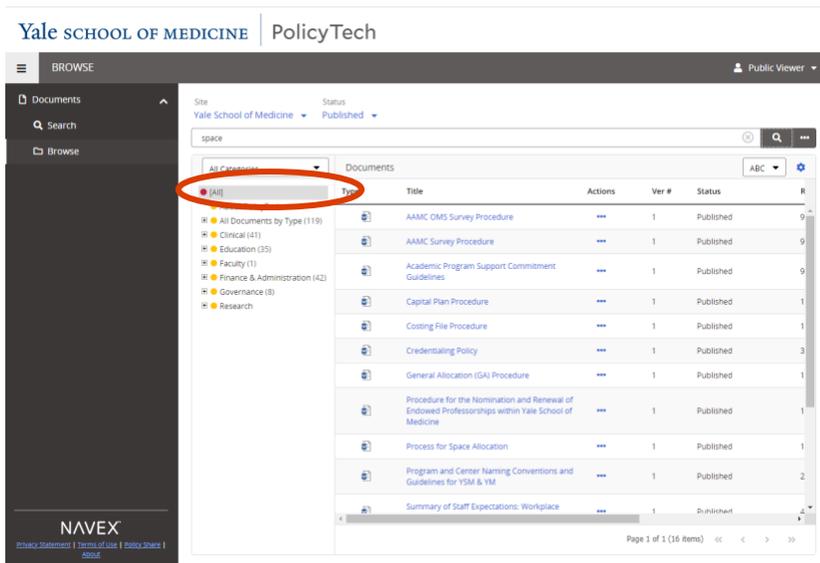
- To search “documents within a specific category”:
  - 1. Select Category
  - 2. Enter “keyword” in the “Find search bar.”
  - 3. Select the magnifying glass in the top right corner.
  - 4. All documents that contain that keyword *and* are within *that category* will display. If you have a category selected ONLY the documents in that category are searched for by your keyword. The selected category in this case will appear highlighted in the left side navigation.

The screenshot shows the 'BROWSE' view in the PolicyTech system. The search bar contains the keyword 'budget'. The left navigation menu shows the 'Finance & Administration' category selected. The main content area displays a table of documents filtered by this category and keyword.

Type	Title	Actions	Ver #	Stat
	AAMC Survey Procedure	***	1	Publ
	Academic Leaves of Absence Procedure	***	1	Publ
	Academic Program Support Commitment Procedure	***	1	Publ
	Annual Budget Procedure	***	1	Publ
	Capital Plan Procedure	***	1	Publ
	Costing File Procedure	***	1	Publ
	General Allocation (GA) Procedure	***	1	Publ
	Long Range Plan Procedure	***	1	Publ
	Q2 Forecast Monitoring Procedure	***	1	Publ
	US News and World Report Survey Documentation Procedure	***	1	Publ
	YSM Recommended Program Usage Reference Material	***	1	Publ
	YSM YF22 Year-End Closing Procedures	***	1	Publ

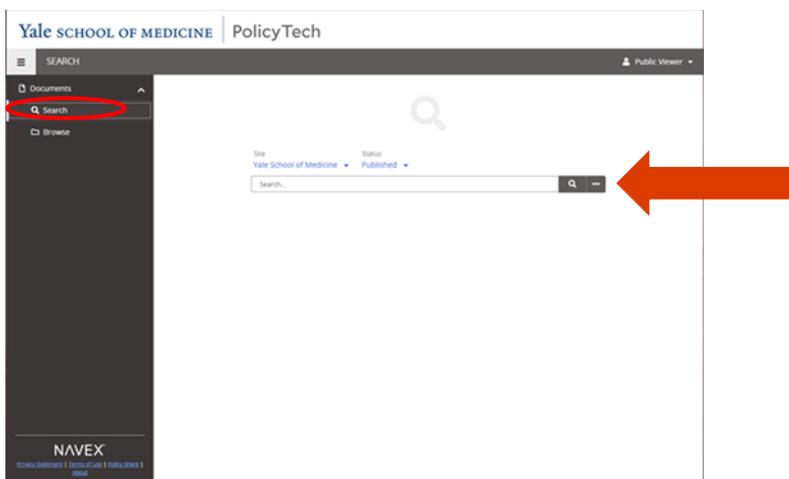
All of these documents contain the word "budget" and are housed under the Finance & Administration Category.

- To search for a document throughout all PolicyTech documents, choose [ALL] option located at the top of the category list prior to typing in the keyword for your search. This will prompt the system to search across ALL categories for the relevant document. Then follow the same steps as outlined above (i.e., enter key word into the search bar and select the magnifying glass in top right corner).

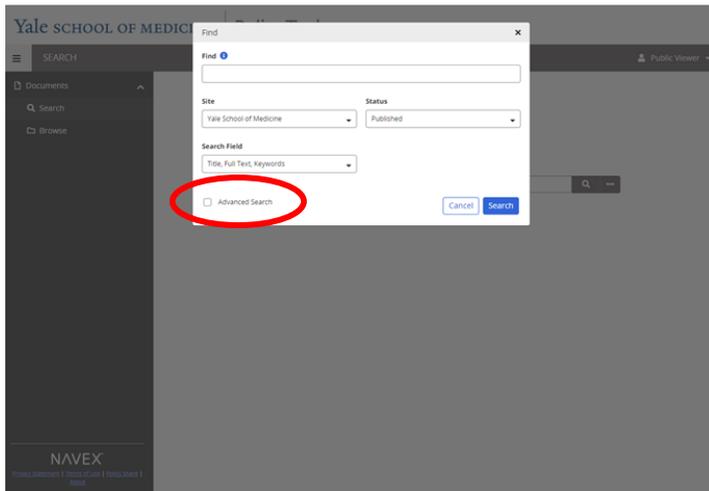


## SEARCH FOR A DOCUMENT USING “SEARCH” VIEW

- Searching for a document using the “Search” view will always prompt the system to conduct a search across ALL published documents.



- Results can be further refined by clicking on the “...” and then selecting “Advanced Search” Option.



## KEYWORD SEARCH

Keyword searches titles, categories, all text of a document, and tagged keywords:

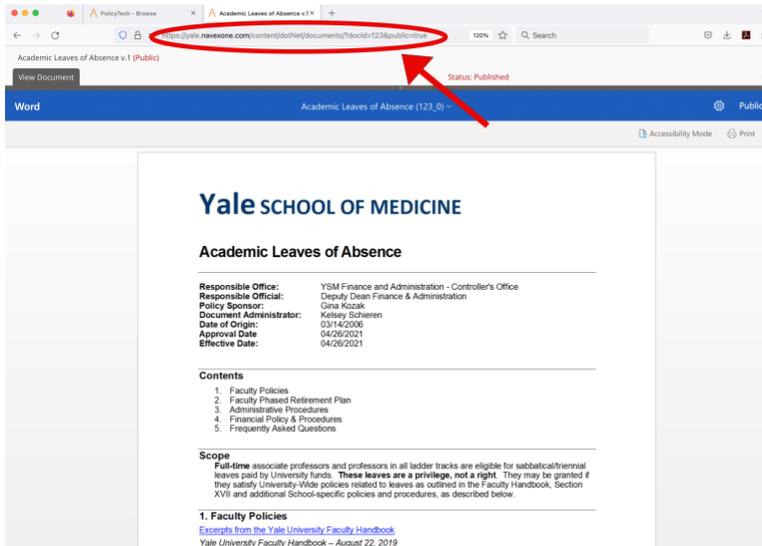
- **Type a single word**  
This returns a list of documents that contain that word within the title, content, or tagged keywords.
- **Type multiple words**  
This returns a list of all documents that contain all of those words.
- **Type multiple words separated by OR**  
This returns a list of documents that contain at least one of those words.
- **Type a word preceded by NOT**  
This returns a list of documents that do not contain that word.
- **Type one or more words in quotation marks**  
This returns documents that contain that exact text.

In case the document you are looking for does not appear in the search results, kindly send an email to [yism.policy@yale.edu](mailto:yism.policy@yale.edu) with your proposed keywords.

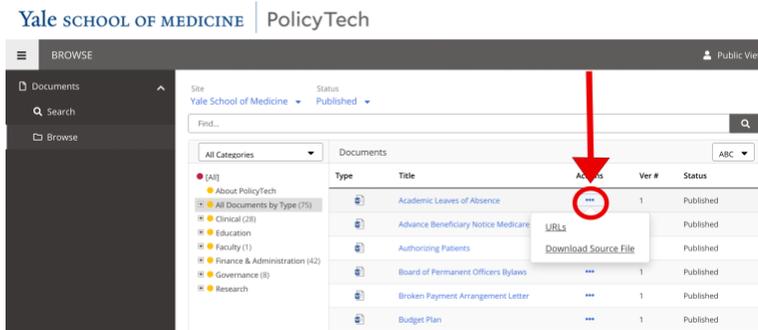
## SHARE DOCUMENTS

To share a document via email with another user, copy the URL of the document and paste it into your email client. There are two ways to do this:

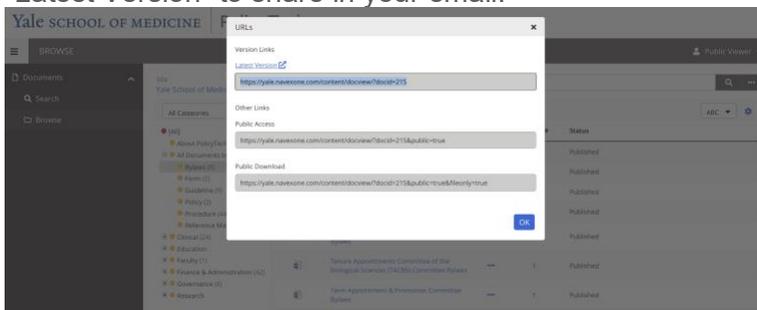
1. If you have the document open, copy the URL of the document from your browser and paste it into an email client to share.



2. If you have the “Browse” view open:
  - a. Click the three dots next to the file title you want to share, and select “URLs”:

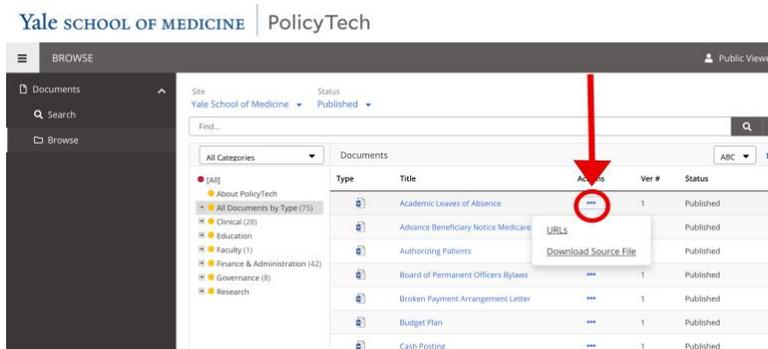


- b. This will provide you with a pop-up window with urls to copy. You will usually want to copy the “Latest Version” to share in your email:



## DOWNLOAD A DOCUMENT

In general, it is recommended that you always view documents in PolicyTech, so you are seeing the most updated version of the information. However, if you need to download a document, click the three dots next to the file title you want to download, and select “Download Source File.” This will download the file onto your hard drive.



## CLOSE POLICYTECH

Close your browser window to close PolicyTech.

## POLICYTECH GENERAL FAQs

1. Which documents are included in PolicyTech?

PolicyTech comprises all the specified policies, procedures, guidelines, forms, and reference documents specific to Yale School of Medicine.

2. In case of discovering an error in a document in PolicyTech, what should I do?

You can report the error by contacting [ysm.policy@yale.edu](mailto:ysm.policy@yale.edu).

3. If I have a specific question regarding the content of a document, what should I do?

Please contact the policy sponsor and document administrator indicated on the document to seek clarification for any specific questions related to its content.

4. What should I do if I am unable to locate a document within PolicyTech?

If you cannot find a document in PolicyTech, please contact [ysm.policy@yale.edu](mailto:ysm.policy@yale.edu) for further assistance.

5. Who has access to the documents in PolicyTech?

Access to view PolicyTech documents is limited to users who are on a Yale IP address.

6. Whom should I contact to provide suggestions for improving PolicyTech?

Send your suggestions for improving PolicyTech to [ysm.policy@yale.edu](mailto:ysm.policy@yale.edu).