

USER GUIDE

Libraries

Basic User Guide

Libraries is referring to online resources that your company has uploaded to the system. A **Library Resource** could be a policy, form, safe operating procedure, etc. You are able to access each library resource on their respective pages by using the **Navigation Bar** located on the left-hand side of your screen. For example, if you wanted to access a policy, you would click on the **Policies** icon.



You can also access library resources through your **Dashboard**. Find the **Widget** for the library you would like to access and click on the graph image. This will redirect you to that specific library where you can access library resources.


Libraries: Policies



Once you have made your way to the library of your choice, you will arrive at the summary page. All libraries function the same so we will choose **Policies** as an example. On the summary page, you will see the page is broken out into two sections: **Outstanding Sign-Offs** and **What's New**.

Outstanding Sign-Offs: These are policies that are up for review and require your sign-off.


Outstanding Sign-Offs

^ Name		Service	Header
	Attendance and Punctuality Open	Human Resources	Section 01 - Standards of Conduct

What's New: These are newly added policies that have been uploaded to the system by your administrator.

What's New

Below is a list of the newly added/updated resources within the last 30 days. Click on the resource name to view the resource.

^ Name		Service	Header
	Attendance and Punctuality Open	Health & Safety	Section 01 - Policy

Next to each policy name is an icon. This icon tells you the policies file type, for example, HTML, PDF, Word Document, etc.

Open

To access the policy, simply click the **Open** button below the policy name.

Accessing Resources by Service

Start by accessing the library for the resource you are looking for by selecting the appropriate icon from the **Navigation Menu**. We will continue to use **Policies** as our example.

Across the top of the page you will see the different services for your company, for example, health and safety, human resources, etc. Select the service in which your resource applies to.

POLICIES SUMMARY

HEALTH & SAFETY

HUMAN RESOURCES

In our example, we have chosen **Health & Safety**. All the Healthy & Safety Policies are shown here and broken out by **Headers**. At a glance, you can read a short description summarizing what the policy is about. You can also see when the policy was created and which date it was revised on.

Section 01 - Policy

HTML Health and Safety Policy Statement

Open

Required by law, the Health and Safety Policy sets the workplace commitment to Health and Safety. This policy is to be reviewed annually and signed by the Owners annually and posted within the workplace.

Created on: September 14, 2016

Revised on: January 02, 2018

Open

To access the policy, simply click the **Open** button below the policy name.

If you are having troubles finding the specific policy you can use the **Search** bar located at the top of the page. Type in the name of the document or keywords in the title and press **Go**.

Dress Code

Go

If the resource exists, it will display on the page. If no results are found then the page will read **No results found**.

How to Sign-Off

To access the policy, simply click the **Open** button under the policy name. Across the top of the policy will be the name of the policy, the issue date, review date, last revision date, and next review date.

Health and Safety Policy Statement

Issue Date: January 1, 2018

Review Date: June 1, 2018

Last Revision Date: January 1, 2018

Next Review Date: June 1, 2019

Below that is the policy itself. Review the policy and note any questions you may have. Please speak to your immediate supervisor to get any answers you may need. Once you understand and agree with the policy, it's time to sign-off on it.

Located at the bottom of the screen is the **Sign-Off** function. If you do not see this portion then the policy or resource you are reviewing does not require a sign-off. To sign off that you understand and agree with the policy, simply click the **Agree** button.

Sign-Off

By agreeing below, I Test Admin declare that I have read, understood and agree to the Health and Safety Policy Statement. For questions regarding this Policies, I will speak to my immediate supervisor.

Agree

If you would like to print the policy for your records, click the **Print** link found in the top right-hand corner of the policy page. This will open up a **Print Preview** of the policy, select **Print** again to proceed. Once you are finished, select the **X** in the top right corner of the preview window to close the print preview.

To return to the policy library, select the **Back to Policies** link located under the **Print** link.