

Frequently asked questions regarding PolicyTech:

1) What is PolicyTech?

PolicyTech is a policy and procedure management software that simplifies the policy lifecycle, ensuring all stakeholders are aware of the latest policies and procedures at all times.

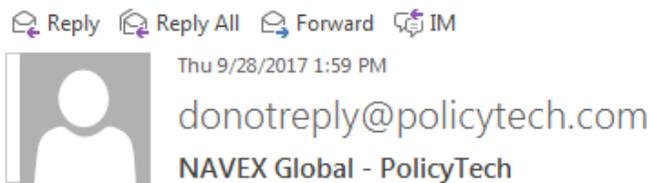
2) Who is my contact at Colonial for PolicyTech?

Dawn Jones, SMS Coordinator, in the corporate office - djones@colpipe.com;

Office: 678-762-2275, during normal business hours of 8-5 (EST) Monday through Friday.

3) How will I be notified about an account in PolicyTech?

Once a PolicyTech account has been created, PolicyTech will send out an email to alert you that your account has been created.



Welcome Name . An account has been created for you in the policy and procedure management software for NAVEX Global. If this is your preferred language, [click here](#) to select it and proceed to the software.

Click the link in the email to be sent to the PolicyTech webpage

4) What should I do if I forget my userid and password?

If you forget your password on PolicyTech, you can reset it from the login page.

1. Go to the login page <https://colpipe.policytech.com/dotNet/noAuth/login.aspx>, and click **Forgot Password?**

POLICYTECH™
Policy & Procedure Management

Username

Password

Domain
None

[Forgot password?](#)

2. On the next page, put in your username (should be your email), and click Submit

POLICYTECH™
Policy & Procedure Management

Forgot password?

Enter your username for a link to reset your password.
If you do not have an email address on file, please
contact your administrator.

Username:

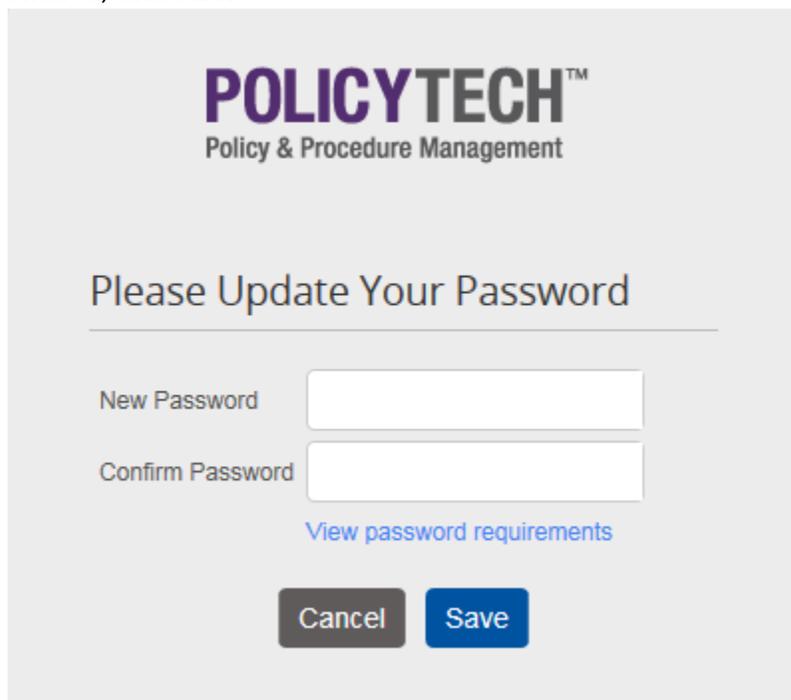
3. PolicyTech will send an email with a link that can be used to reset your password. Click the link to move forward

This email was sent automatically by the PolicyTech software in response to your request to recover your password.

To reset your password and access your account, click on the link below. If nothing happens when you click on the link, copy and paste the link into the address bar of your web browser. This link will be valid for only one hour.

<https://colpipe.policytech.com/dotnet/noauth/login.aspx?uid=7149&r=5f6a8409cbad4668bcf9ea4783e27084>

4. The link will open a page where a new password can be put in. Once the password has been entered, click save.



The screenshot shows a web form for updating a password. At the top, the PolicyTech logo is displayed with the tagline 'Policy & Procedure Management'. Below the logo, the heading 'Please Update Your Password' is centered. The form contains two input fields: 'New Password' and 'Confirm Password'. A blue link labeled 'View password requirements' is positioned below the 'Confirm Password' field. At the bottom of the form, there are two buttons: a grey 'Cancel' button and a blue 'Save' button.

5. Once the new password has been saved, you will be logged into PolicyTech with an updated password.

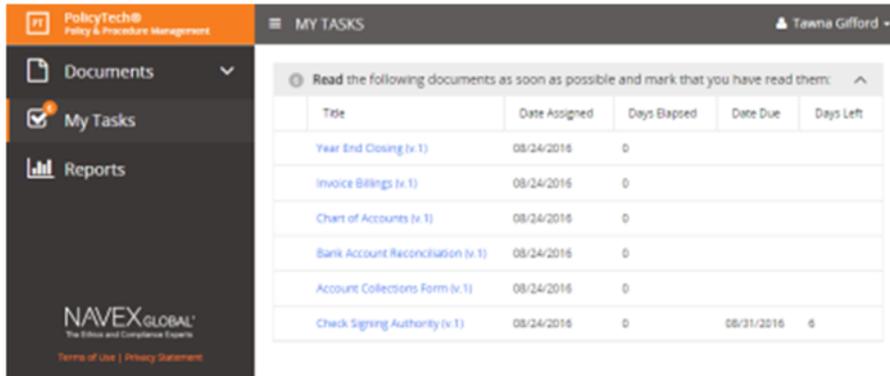
5) How do I acknowledge a policy or procedure?

In order to acknowledge a document on PolicyTech, there are three things that will need to be done:

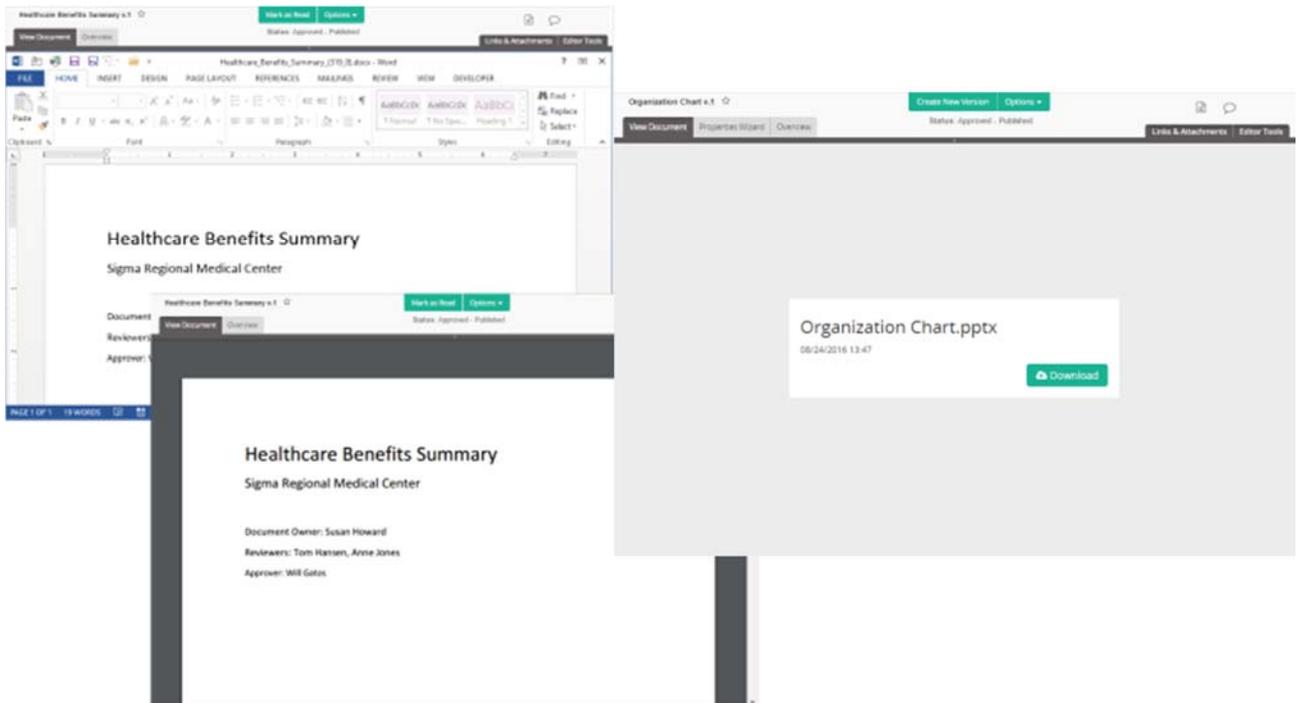
1. Read the document
2. Mark the document as read
3. Complete questionnaire acknowledging that the reader has read, understands, and agrees with the document as written (only applies to documents with questionnaire).

Reading a document

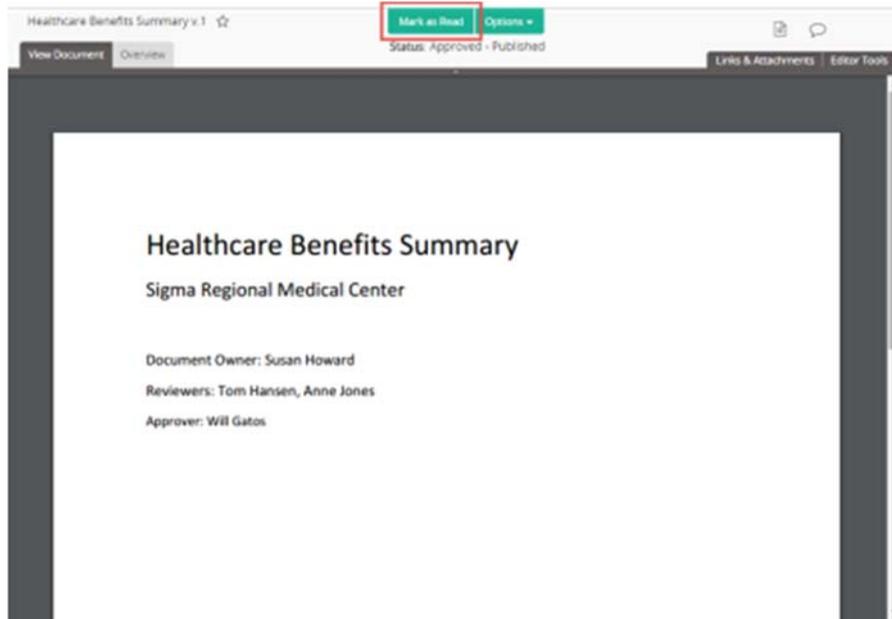
1. Click **My Tasks**, click the **Read** heading, and then click the document title.



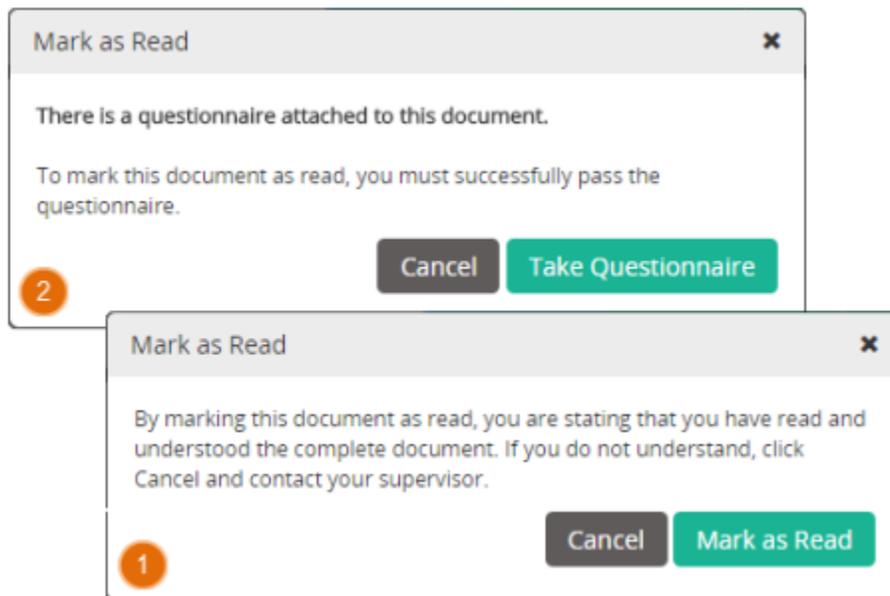
2. Thoroughly read the document. If the document looks like the documents on the left, use the window to read through the document. If the document looks like the image on the right, click download to open or save the document on your computer.



3. Click **Mark as Read** at the top of the document window.



4. One of two windows will come up depending on if the document has a questionnaire.



5. Follow the instructions below for the window you see:
 1. Read the message, and then click **Mark as Read** to confirm the action
 2. Click **Take Questionnaire**

6. The first question will ask if you understand and agree to comply with the procedure or policy and to ensure that all agents, employees and/or subcontractors of your company who

Take Questionnaire ✕

By clicking on the Agree button below, I hereby acknowledge that I have received and read, in its entirety, Colonial's Example. I understand and agree to comply with the procedure and to ensure that all agents, employees and/or subcontractors of this company who perform work on any jobsite for Colonial are informed about and instructed on the procedure or policy and comply with the procedure or policy in its entirety. I further agree that, should I have any questions about the procedure or policy, including any questions about how the policy or procedure applies to the work that this company will be performing on a Colonial jobsite, I will contact my Colonial representative and will ensure that my questions are resolved before any agent, employee or subcontractor of this company begins performing any work on any jobsite for Colonial where this policy or procedure is applicable.

Agree

Disagree

Acknowledged By:

Job Title:

Company Name:

Cancel Submit Answers

perform work on any jobsite for Colonial are informed about and instructed on the procedure or policy and will comply with the procedure or policy in its entirety. If you do not understand or do not agree with the statement in its entirety, click disagree.

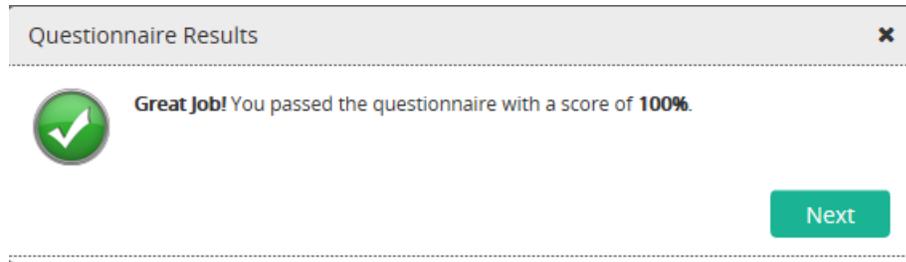
- A. If you disagree with the first question, you will see a message like the one below. If you do not understand the document, click **Return to Document**; and contact your Colonial representative to discuss.

Questionnaire Results ✕

 **Sorry.** Your score was **75%**. You must get at least **100%** to pass the questionnaire.

Return to Document Retake Questionnaire

7. If you do click on “agree”, the document will be marked as read with the following message. Click **Next**, which will close the window.



6) **How will I be notified of a policy or procedure change?**

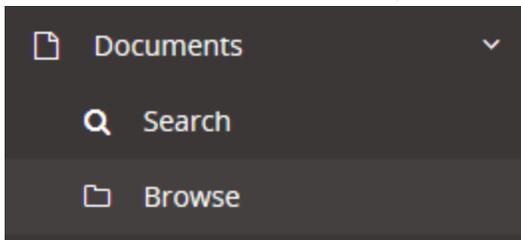
You will receive an email notification from PolicyTech stating that you have a task located in your “my task” folder that needs to be completed.

7) **Why are there duplicate documents in PolicyTech?**

The documents in PolicyTech were arranged according to task to help locate the applicable policy or Procedure.

8) **How can I search for a particular document?**

1. On the left side of the screen, click **Documents**, and then click **Search**.



2. On the right hand of the screen, there will be a search bar where the title of a document can be put in. Be sure that the site is set to contractor, and click search.



3. A list will be created by PolicyTech of all the documents that meet the search criteria.

Documents			
Type	Title	Ver #	Status
	Attachment 45 Details of Cadwelding Copper Test Leads to Pipeline	1	Approved
	Attachment 68 Two-Wire Pipeline Bond Test Station	1	Approved
	Attachment 77 Typical Pipeline Warning Sign	1	Approved

4. To download the file, click the icon left of the title to bring up the options available for the document, and click **Download Source File**.

	Attachment 45 Details of Cadwelding Copper Test Leads to Pipeline	1	Approved
	Attachment 68 Two-Wire Pipeline Bond Test Station	1	Approved
	Attachment 77 Typical Pipeline Warning Sign	1	Approved
	Attachment 77 Typical Pipeline Warning Sign	1	Approved

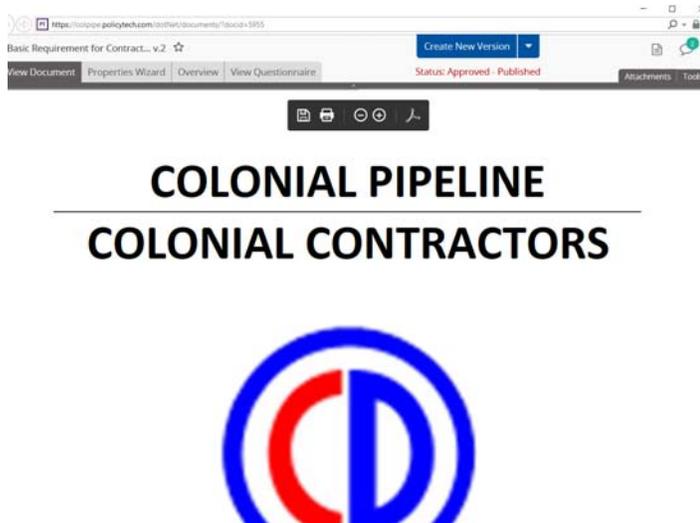
- Document URLs
- View Properties
- Add to Favorites
- Download Source File

5. A prompt should appear at the bottom of the page asking if the file should be opened or saved. Choose the option that best fits your needs.



9) How can I download a document?

After opening a document, hover around the top of the document to make the save/print box appear, then click save/disk. This is also contains the print command.



10) Do I need any special software to download or run PolicyTech?

	Apple	Android	PC/Mac
Software	iOS 9 or later	Android 4.4 or later	N/A
Open with	PolicyTech App	PolicyTech App	Chrome recommended(though Firefox and Internet Explorer should be fine)
Hardware	IPhone 5 SE or later	PolicyTech may not run on all Android devices, but devices should have at least 1.4 GHZ processor and at least 2 GB of RAM	N/A

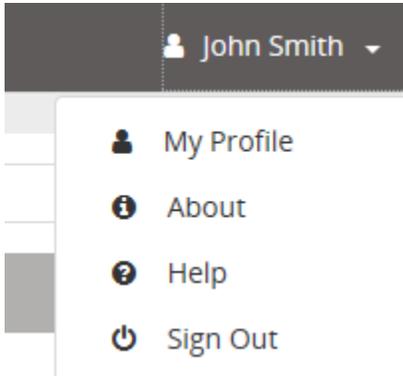
11) How often are policies and procedures updated?

The review and update varies among the different policies and procedures, but, in general, the documents are reviewed and, if necessary, updated on an annual basis.

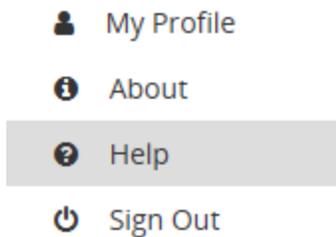
12) Will there be any training sessions regarding PolicyTech?

PolicyTech has help documentation to help users navigate through the software.

1. Click your name in the upper right hand corner to pull down the drop down menu.



2. Click Help to bring up the PolicyTech help menu



3. Use the search bar in the top right corner to search for the topic you would like more information on.



4. If you are unable to find what you are looking for by searching, use the Contents bar to the left to get a list of all the topics covered in the documentation.

