



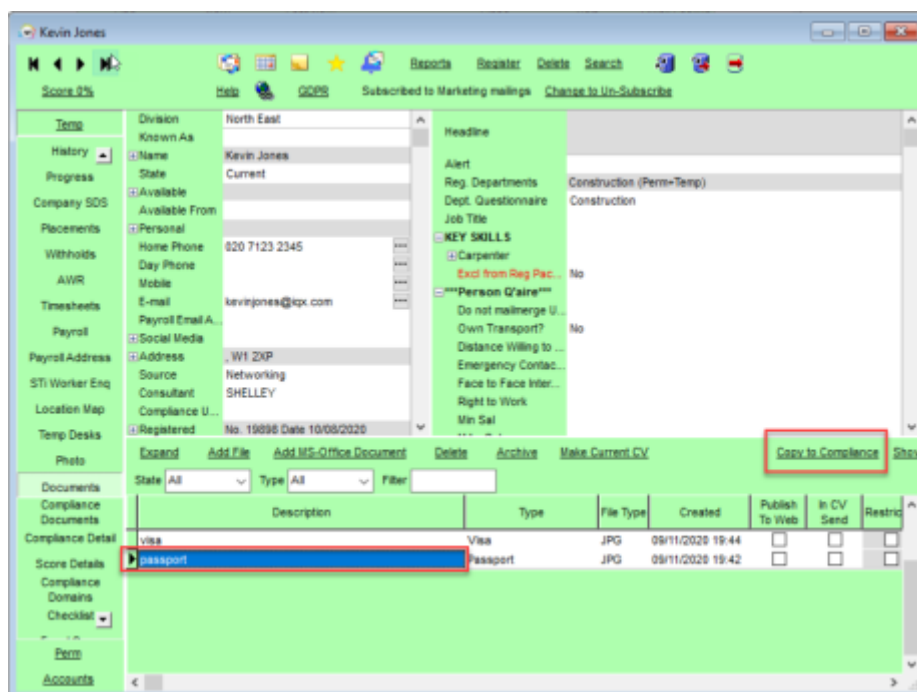
Separation of Compliance Docs and Docs

This feature separates out Compliance Documents by document type.

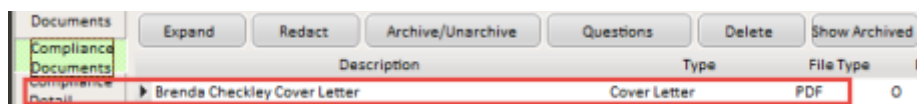
To access this feature in the Person form, scroll down the sidebar.

Compliance documents can be created in:-

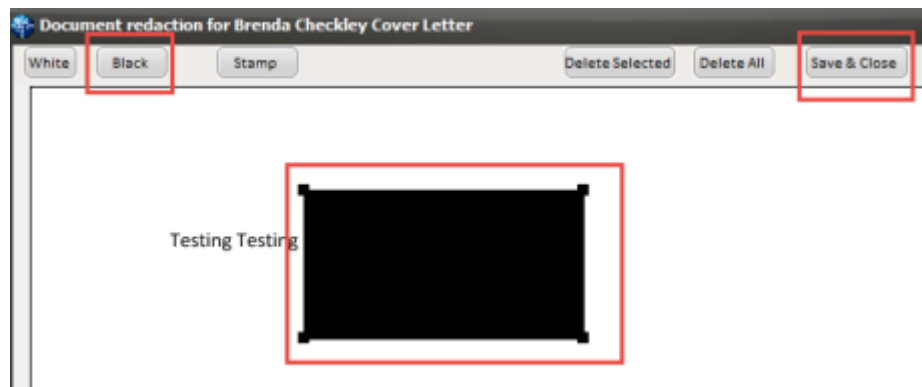
Person form - Documents - Select document - Copy to Compliance OR Drag a document into Compliance Documents. Select all or part of the document - Save Compliance - Select Document Type - Complete Compliance document questionnaire.



Compliance documents are saved as pdf documents. A pdf copy of the compliance document will be saved in Compliance Documents.



Compliance documents may be redacted. Select the document - Redact - Select the Black or White button - Click and hold down the left mouse key to drag a square over part of the document - Save and Close.



Redacted documents have a file type R in Compliance Documents.

Questionnaire	ExpandRedactArchive/UnarchiveQuestionsDeleteShow ArchivedShow				
Notes					
	Description	Type	File Type	Publis	
2nd Notes	▶ Brenda Checkley Cover Letter	Cover Letter	PDF	O	
Reference	Brenda Checkley Cover Letter	Cover Letter	PDF	R	
History					

This feature may require System Administrator setup.

From:
<https://iqxusers.co.uk/iqxhelp/> - iqx

Permanent link:
<https://iqxusers.co.uk/iqxhelp/doku.php?id=separationofcompliance docs and docs&rev=1469176235>

Last update: 2017/11/16 21:57

