convergepoint

Compliance Software on the
Microsoft® SharePoint™ Platform

Extending Microsoft SharePoint
to Achieve Best Practices in Your Policy Lifecycle

Keeping up with the constantly evolving regulations and industry best practices in regulatory compliance management challenges all organizations. Compliance teams are always looking for more efficient ways to achieve three main goals: **ensure policies are in line with the latest legislation; share and train employees on updated policies; and ensure your organization stays compliant.**

ConvergePoint understands and helps you address these challenges with state-of-the-art Policy Management Software, built on Microsoft SharePoint, to manage the entire policies and procedures lifecycle.

By constantly listening to our customers and keeping a pulse on industry best practices, ConvergePoint is able to provide software that is scalable to any size organization. Our business-user-friendly software offers compliance and risk management teams all the tools to effectively manage policies and procedures, while leveraging existing IT infrastructure and expertise.

How You Benefit from SharePoint Compliance Software:

- One central platform to manage entire lifecycle
- Tight integration with Microsoft Office and Exchange
- User-friendly workflow builder for multiple review-routing options
- Extensive document version control
- Robust, customizable search capabilities
- Real-time reporting
- Audit logs on discussions and actions
- Automated publishing of approved policies and procedures
- Management of employee understanding and attestations
- User-friendly quiz/acknowledgement builder

convergepoint.com | 888.484.8048

Policy Management Software

Where Policies and Productivity Combine

Our easy-to-use Policy Management Software is one secure, robust platform comprising three SharePoint modules that represent the different phases of the policy lifecycle:

> Policy and Procedure Creation

- Draft, review and approve policies built from existing templates or uploaded files
- Rely on robust rules engine to initiate custom workflows and send automated tasks to policy drafters, reviews and approvers
- Automatically integrate with Microsoft Office to keep existing documents in the same file formats and use programs you're already familiar with
- Use the company address book to provide document level access and security
- Always work from the latest version, while keeping revisions, notes, version history, discussions and approvals for audit purposes
- View policy status and progress updates from real-time dashboards
- Get extensive search and real-time reporting capabilities
- Have complete audit trail for each document
- Easily handle renewals, revisions and retirements
- Send automated notifications when policies are up for renewal, expiration or retirement

> Policy and Procedure Library

- Auto-publish policies and procedures to one central document repository, and send emails notifying employees of new or updated policies
- Quickly find specific policies, organized by type, department and other categories
- With role-based user access, restrict access so employees see only policies relevant to them
- Produce ad hoc reports based on key criteria and metadata
- Automatically archive expired and retired policies

> Policy and Procedure Training & Certification

- Ensure employees read required policies and procedures
- Have employees take optional quizzes to ensure understanding of content
- Ensure compliance by having employees sign off and acknowledge that they have read specific documents
- Automatically alert employees when new information is available
- Request recurring sign-offs at predefined intervals for high priority documents
- Send escalation alerts when employees have pending tasks
- Track progress from managerial dashboards and extensive real-time reports to ensure employee compliance

Schedule a live demo to see how the **ConvergePoint** Policy Management Software can improve policy and procedure compliance across the organization.