Passport 360

Documents User Guide

Passport 360 users can make documentation available to relevant individuals and stakeholders. With templates and policies uploaded to the system, service providers and employees have instant access to documentation relevant to them.

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Documents User Guide

Notice

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Passport 360

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Quick Tips

TIP 1: For easy searching of a specific document, use the “Search” selection.

TIP 2: To edit a document, use the

edit option available.

TIP 3: To delete a document, select the document and delete.

TIP 4: To cancel any action at any given point, simply select the

cancel button to return to the previous field.

Create and

Manage Policies

01

Internet Browser settings

Although Google Chrome is the recommended browser for optimal site performance, Passport 360 is supported by all popular browsers.

1. Create and Manage Policies

Navigate to the Documents tab

available on your dashboard.
Add Company Policies which can be made available to all users linked to your Company, including Contractors linked to your Projects.

Select the

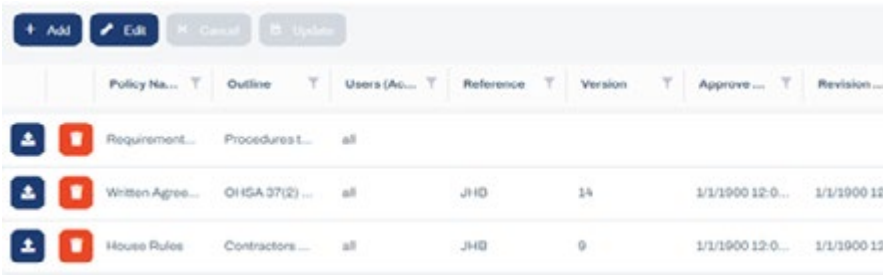
button.
Select

You will be required to fill in the fields.

- Policy Name
- Outline of the Policy
- Select the applicable Users to access the document.
- Document reference
- Document version
- If the Policy has an approved date use the calendar icon available.
- If the Policy needs a revision date, use the calendar icon available.
- Select the responsible person if its applicable.

Once you have filled in the applicable information, select

Your Policy will now be displayed under Your Company Policies.



Select the button to upload your Policy.
If the Policy is no longer valid, select the button to remove the Policy.

Create and

Manage Templates

02

Internet Browser settings

Although Google Chrome is the recommended browser for optimal site performance, Passport 360 is supported by all popular browsers.

2. Create and Manage Templates

Add Company Templates which can be made available to all users linked to your Company, including Contractors linked to your Projects.

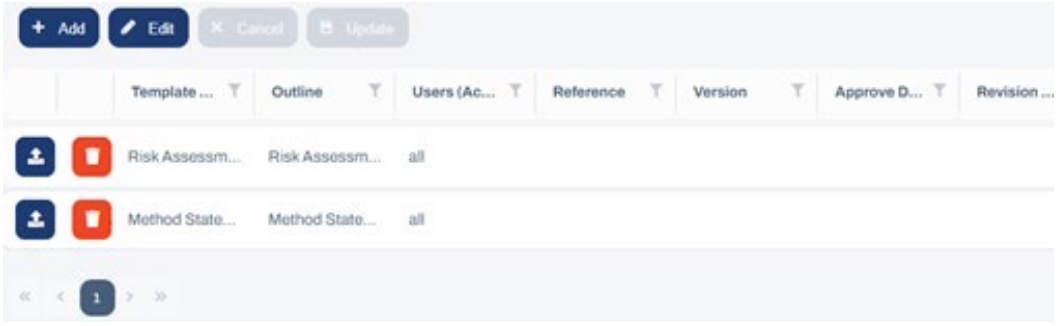
Select + Add

You will be required to fill in the fields.

- Template Name
- Outline of the Template
- Select the applicable Users to access the document.
- Document reference
- Document version
- If the Template has an approved date use the calendar icon available.
- If the Template needs a revision date, use the calendar icon available.
- Select the responsible person if its applicable.

Once you have filled in the applicable information, select Update

Your Template will now be displayed under Your Company Templates.



Select the button to upload your Template.

If the Template is no longer valid, select the button to remove the Template.

Note: When Clicking on Upload, the Policy / Template will be saved. A Notification will be sent to All Users Linked to Your Company when a Template is added, updated, or removed.

Learn more: www.passport360.com

Find us on the Microsoft Appsource and the Azure Marketplace