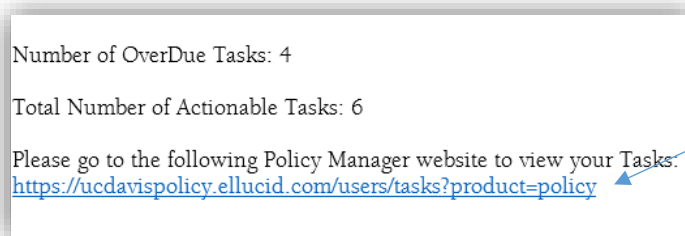


Approving a Policy

1. The policy management system will send a weekly email with your assigned tasks.
2. Click on the link in the email to navigate to your Tasks in the system.

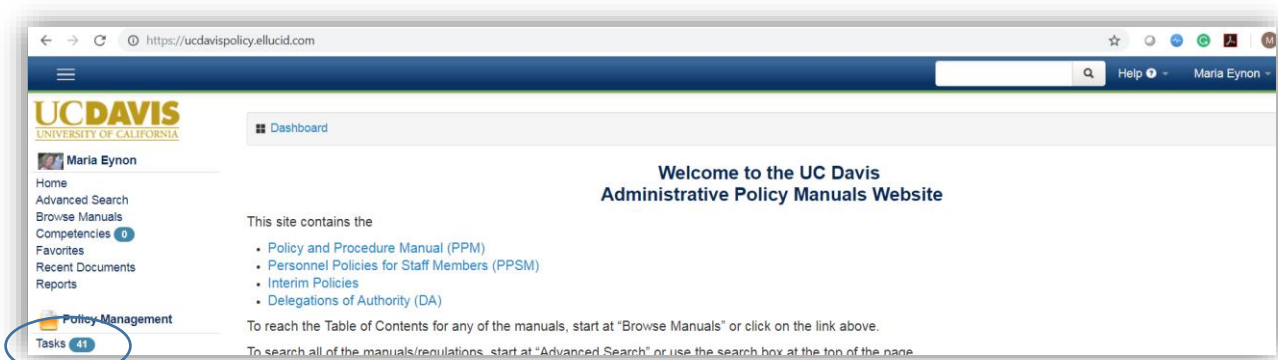


- a. If you are not already logged in, Select Login from the homepage.



Use your UC Davis user name, and the generic “password” in the password field the first time you login. You will be prompted to change your password upon successfully logging in with “password”.

- b. You can also access Tasks from the homepage.



3. Find the policy requiring review in the list and select **View** to access the document.

The screenshot shows a 'Task Filters' section at the top with the following options:

- Display Only Actionable Tasks
- Display Only Tasks That Are: Overdue
- Display Only Tasks Where: Task Start Date

Below the filters is an 'Apply' button. The main section is titled 'Tasks' and shows a table with the following data:

Document Name	Your Task	Current Task	Task Start	Task Due	Status	Checked Out	
Policy 123-45	6 - Final Approval	6 of 6	05/05/2018	05/19/2018	Overdue		View

At the bottom of the table are buttons for 'Copy', 'CSV', 'PDF', 'Print', and 'Export all'. A blue arrow points from the 'View' button in the table to the 'View' button in the 'Task Filters' section.

4. Review the Policy draft, and when you are ready to submit your approval, click the **Approve** button.

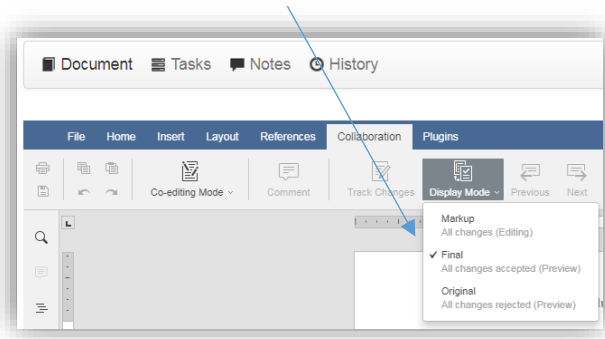
The screenshot shows the 'Policy 123-45' review page. The title is 'Policy 123-45' and the path is '/ Manuals / Test Manual'. The due date is 'Due: May 19, 2018'. The task description is 'Task 6 of 6: Final Approval - Please review for final approval. Clicking the Approve button will send the policy to the Policy Office for final cleanup before posting online.'

At the top of the review area are buttons for 'Document', 'Tasks', 'Notes', and 'History'. On the right side, there are buttons for 'Help', 'Email', 'Checkout', 'Approve', and 'Reject'. A blue arrow points from the 'Approve' button in the task list to the 'Approve' button in this interface.

The main content area shows the following text:

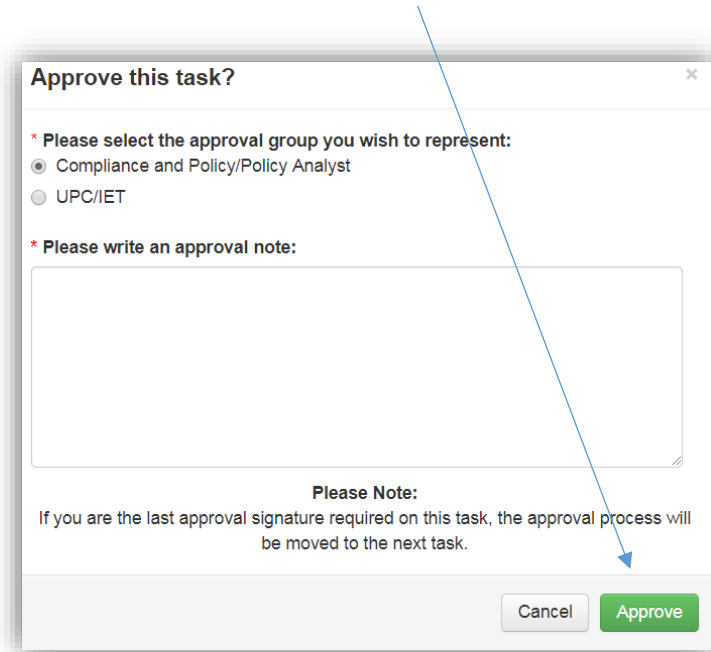
UC Davis Policy and Procedure Manual
Chapter 100, UC Organization
Section 15, UC Administrative Structure
Date: 9/2013
Supersedes: 6/1/00
Responsible Department: N/A
Source Document: N/A

- To view the document draft without the tracked changes showing, select the Collaboration tab, Display Mode, Final All changes accepted (Preview).



Note: Additional changes cannot be made in this view.

- Enter a note in the text box and select **Approve**.



- If there are additional changes that need to be made by the Policy Owner prior to approval, select **Reject**



8. Select the **Policy Owner Approval** step to reject the task back to the Policy Owner to make additional changes, enter a rejection note with your comments, select **Reject** to send the task back.

Reject this task? ✕

Both a step and a note are required.

Please select a step number to reject to:

- Step 1: Initial Draft Creation/Review
- Step 2: Policy Office Review Prior to Formal Review
- Step 3: Formal PPM Review
- Step 4: Policy Office Comment Review
- Step 5: Policy Owner Approval

Please write a rejection note:

Need to add requirements in section III.A to align with current practice.

Do you wish to send this approval process back to the selected step?

A confirmation message will appear when the document has been rejected.