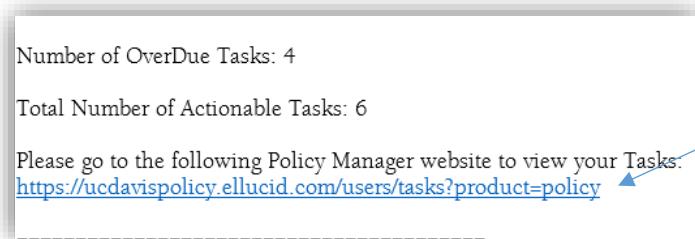


Four-Year Cycle Updates

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

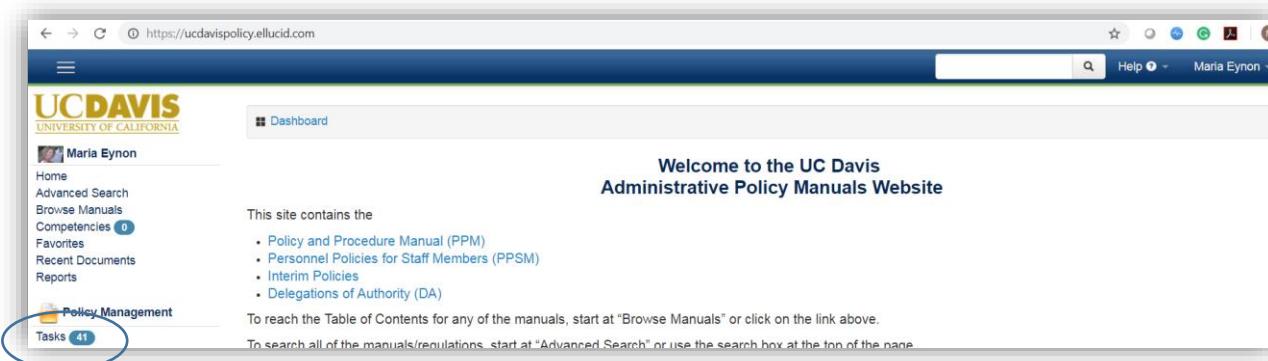


- a. If you are not already logged in, Select Login from the homepage.

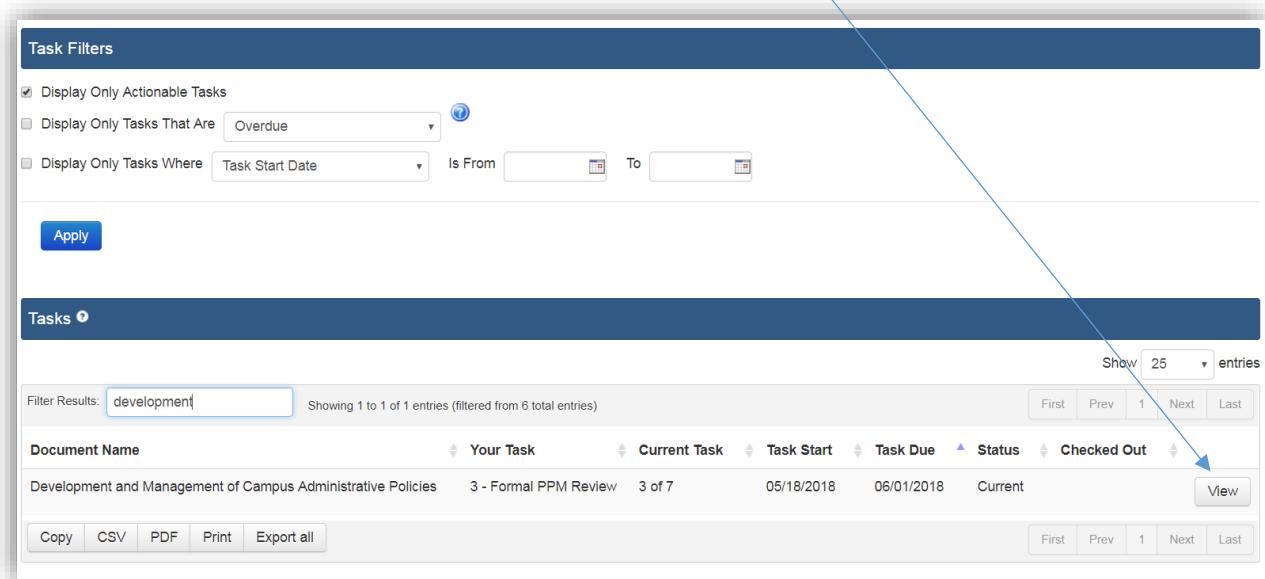


Use your UC Davis user name, and the generic “password” in the password field the first time you login. You will be prompted to change your password upon successfully logging in with “password”.

- 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.



Task Filters

Display Only Actionable Tasks

Display Only Tasks That Are 

Display Only Tasks Where Is From  To 

Apply

Tasks 

Show 25 entries

Document Name	Your Task	Current Task	Task Start	Task Due	Status	Checked Out	
Development and Management of Campus Administrative Policies	3 - Formal PPM Review	3 of 7	05/18/2018	06/01/2018	Current		

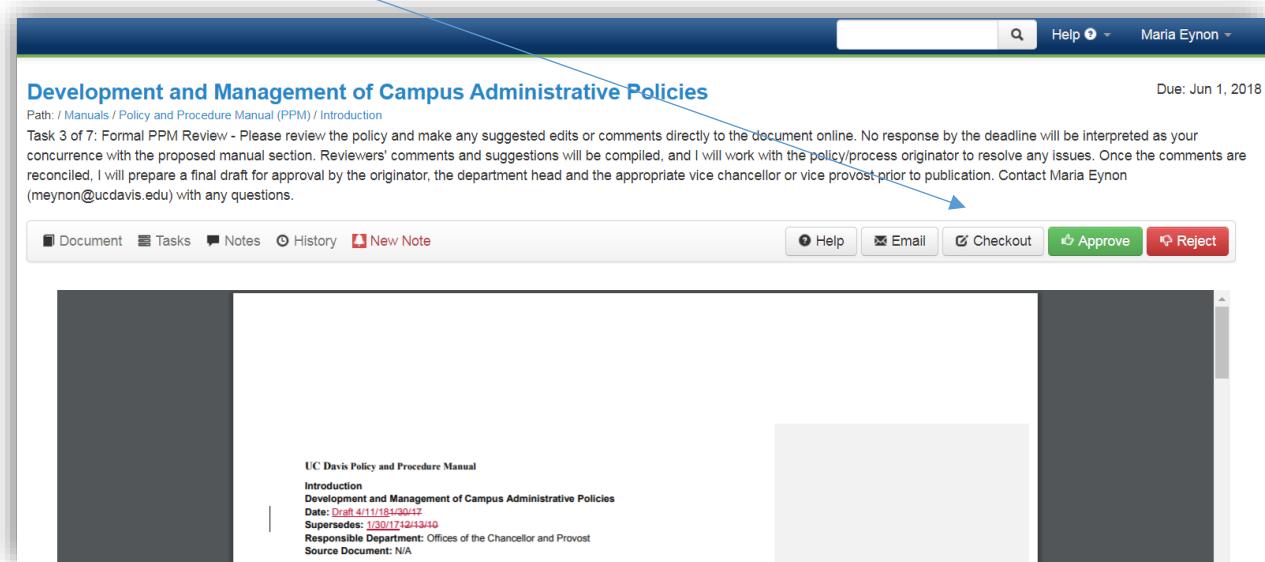
Filter Results: Showing 1 to 1 of 1 entries (filtered from 6 total entries)

First Prev 1 Next Last

Copy CSV PDF Print Export all

First Prev 1 Next Last

4. Select **Checkout** to make changes.



Development and Management of Campus Administrative Policies

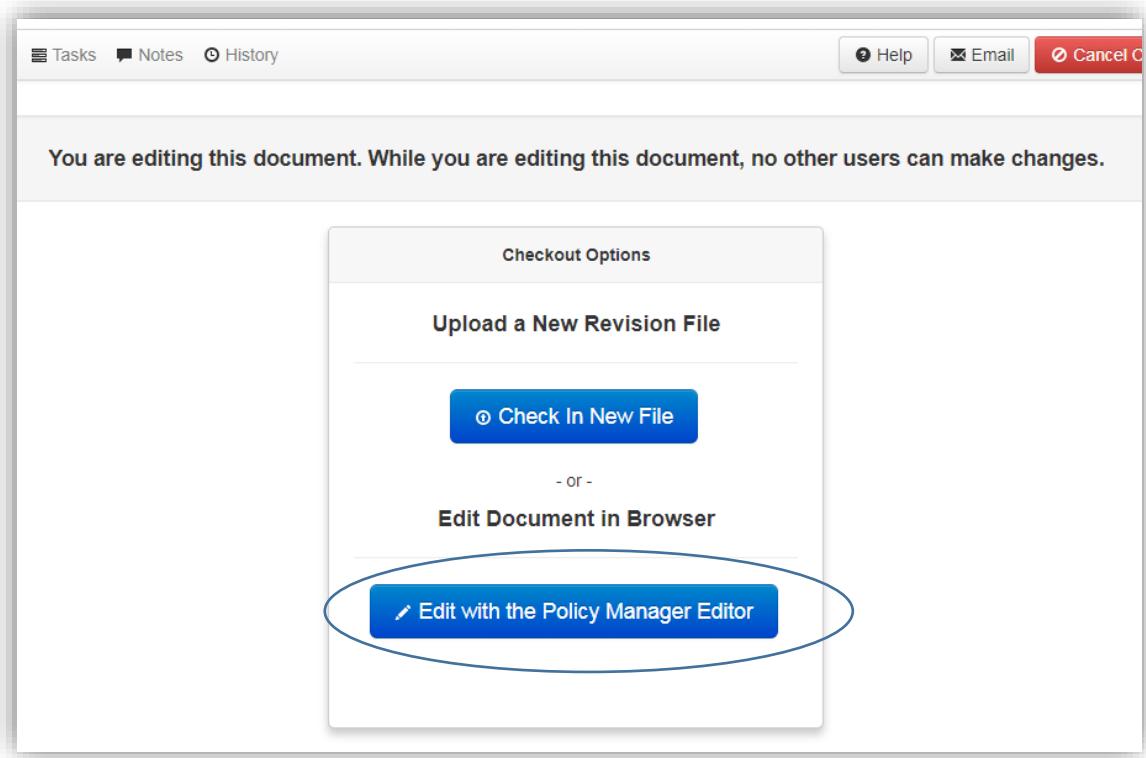
Path: / Manuals / Policy and Procedure Manual (PPM) / Introduction Due: Jun 1, 2018

Task 3 of 7: Formal PPM Review - Please review the policy and make any suggested edits or comments directly to the document online. No response by the deadline will be interpreted as your concurrence with the proposed manual section. Reviewers' comments and suggestions will be compiled, and I will work with the policy/process originator to resolve any issues. Once the comments are reconciled, I will prepare a final draft for approval by the originator, the department head and the appropriate vice chancellor or vice provost prior to publication. Contact Maria Eynon (meynon@ucdavis.edu) with any questions.

Document Tasks Notes History  Help Email Checkout  

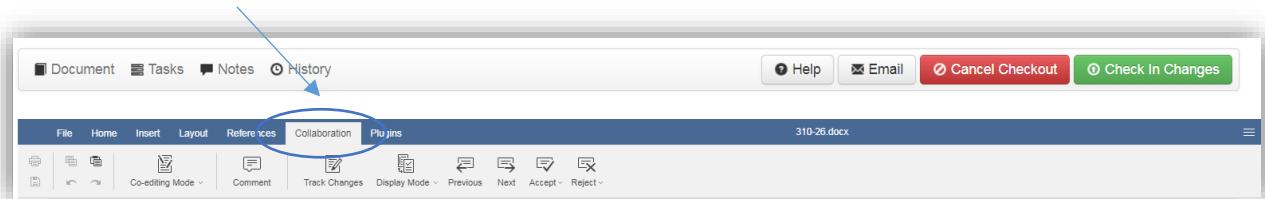
UC Davis Policy and Procedure Manual
Introduction
Development and Management of Campus Administrative Policies
Date: 05/18/2018
Supersedes: 150/174/4340
Responsible Department: Offices of the Chancellor and Provost
Source Document: N/A

5. Select **Edit With the Policy Manager Editor** to open the document in the inline editor.

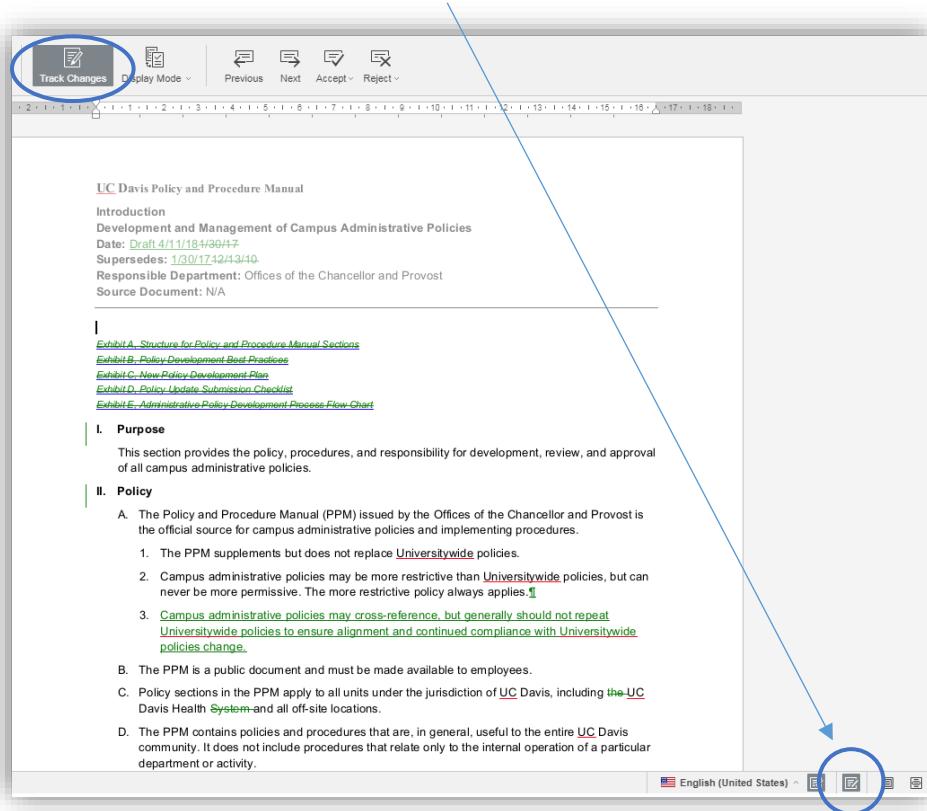


- a. Do not check in a new file (upload) without consulting with the Policy Office first.

6. Select the Collaboration tab.



7. Turn on Track Changes to ensure all changes made are tracked for Reviewers and Approvers to identify.

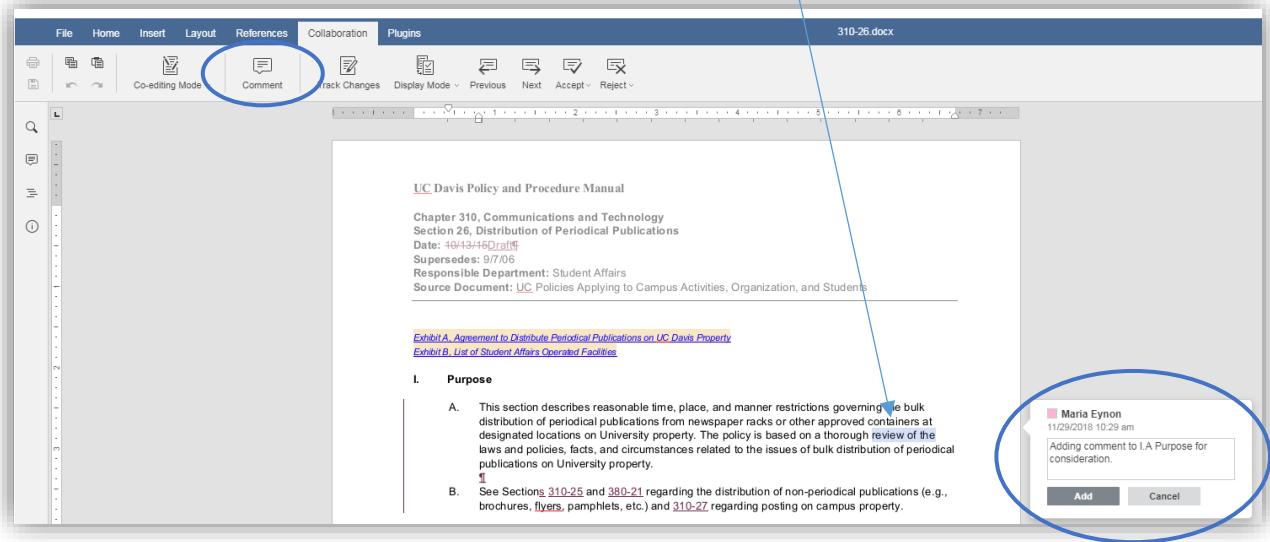


8. To enable Track Changes, select either of the Track Changes buttons. The track changes button at the top of the document can be accessed in the Collaboration tab.

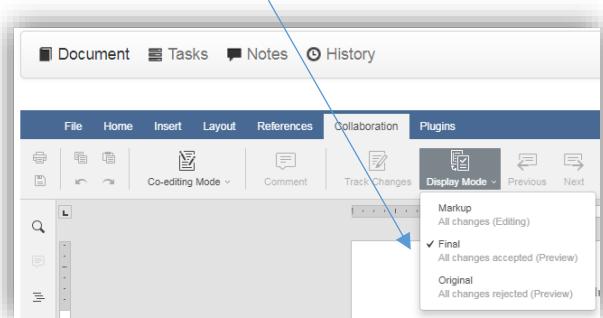
9. Enter your changes directly in the document in the system.

- Comments can be added to the document by highlighting text, selecting **Comment** from the **Collaboration** tab, adding text to the comment box, then selecting **Add**.

Note: To view or respond to other comments when the draft is checked out, click on highlighted text.

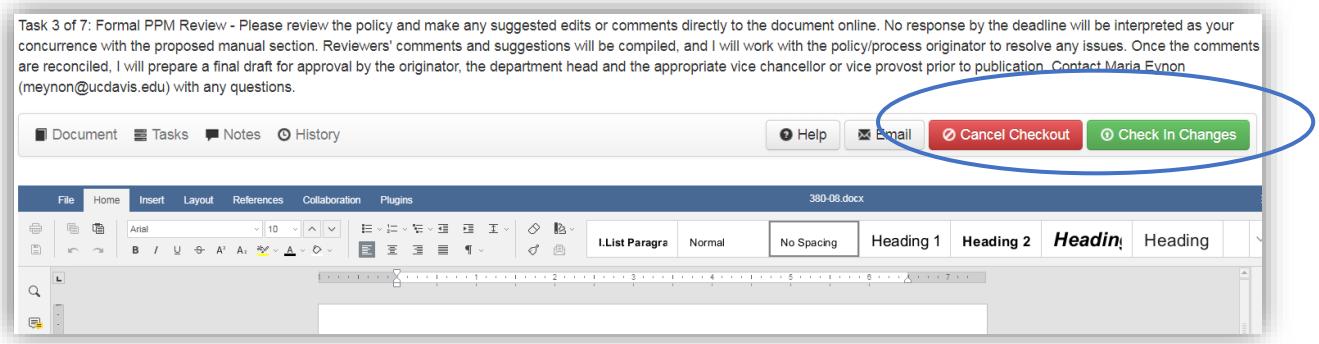


- Updates to numbering and formatting in the document are made through the **Home** tab.
- To view the document without the tracked changes showing, select the **Collaboration** tab, **Display Mode**, **Final All changes accepted (Preview)**.

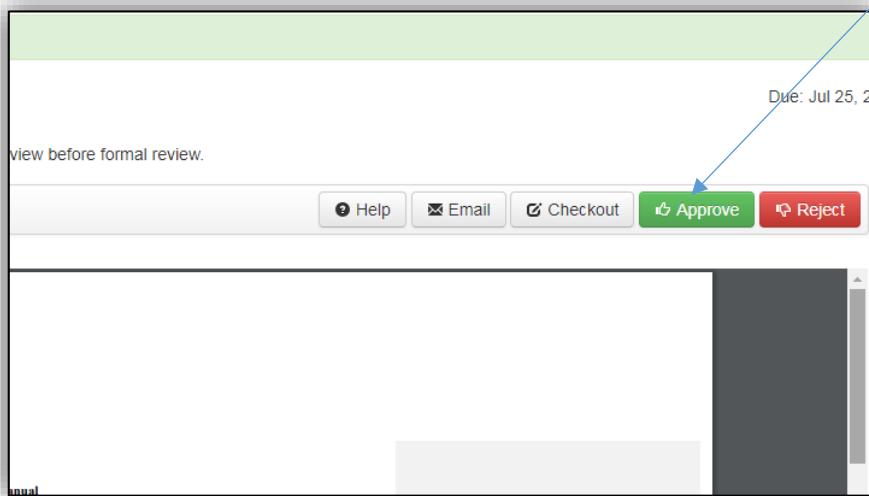


Note: Additional changes cannot be made in this view.

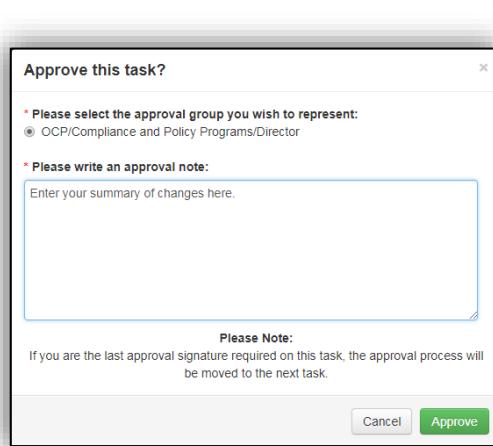
10. When you have completed your edits, select **Check in Changes** to save them and allow other users in the approval flow to access the draft and make changes.



11. If you need to close the document without saving changes, select **Cancel Checkout**.
12. When you are ready to submit the policy into the review process, click **Approve**.

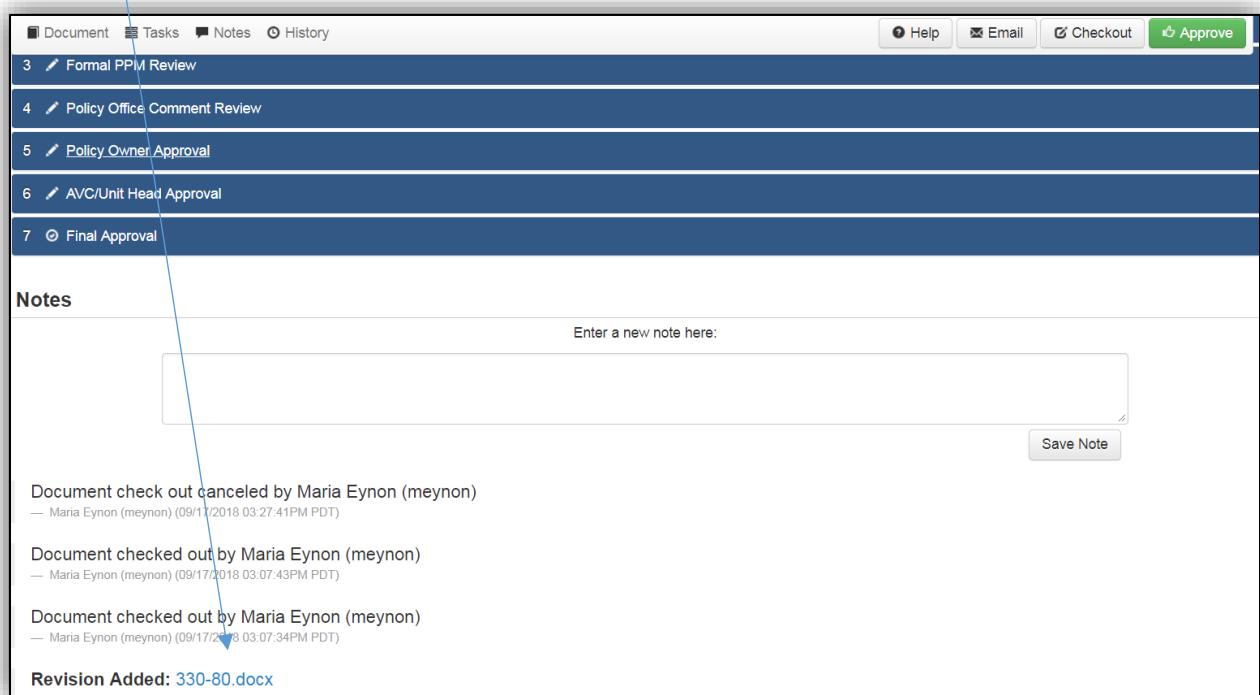


13. Enter a summary of your changes in the text box and select **Approve**.



Note that you are not approving the final version for release but the initial draft. The Policy Office will work with you to finalize the draft prior to sending it for formal review to campus stakeholders.

14. To print or share/email a revision of the document, navigate below the document **Notes**, select **Revision Added** to download the document with all the comments and changes tracked included.



The screenshot shows a software interface for document review. At the top, there are tabs for 'Document', 'Tasks', 'Notes', and 'History', with 'Notes' being the active tab. Below the tabs, a list of review steps is shown:

- 3 Formal PPM Review
- 4 Policy Office Comment Review
- 5 Policy Owner Approval
- 6 AVC/Unit Head Approval
- 7 Final Approval

Below this list is a section titled 'Notes' with a sub-instruction 'Enter a new note here:' followed by a text input field and a 'Save Note' button. Under the 'Notes' section, there is a list of document checkouts:

- Document check out canceled by Maria Eynon (meynon)
— Maria Eynon (meynon) (09/17/2018 03:27:41PM PDT)
- Document checked out by Maria Eynon (meynon)
— Maria Eynon (meynon) (09/17/2018 03:07:43PM PDT)
- Document checked out by Maria Eynon (meynon)
— Maria Eynon (meynon) (09/17/2018 03:07:34PM PDT)

At the bottom of the notes section, the text 'Revision Added: 330-80.docx' is displayed.

Off-Cycle Updates

1. Contact the Policy Office to request initiation of an update to a policy outside of the four-year cycle.
2. The Policy Office will initiate the update/approval process in the system, and send you an email with a link to your task in the system.
3. Follow the procedures included in **Four-Year Cycle Updates** above.

Initiating a New Policy

1. Submit a [Policy Development Plan form](#) to the Policy Office to request initiation of a new policy.
2. The Policy Office will review the request, and if it is approved for inclusion in the PPM, activate a policy template, and send you an email with a link to your task in the system.
3. Follow the procedures included in **Four-Year Cycle Updates** above.