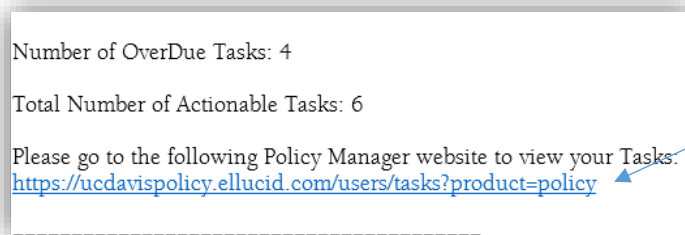
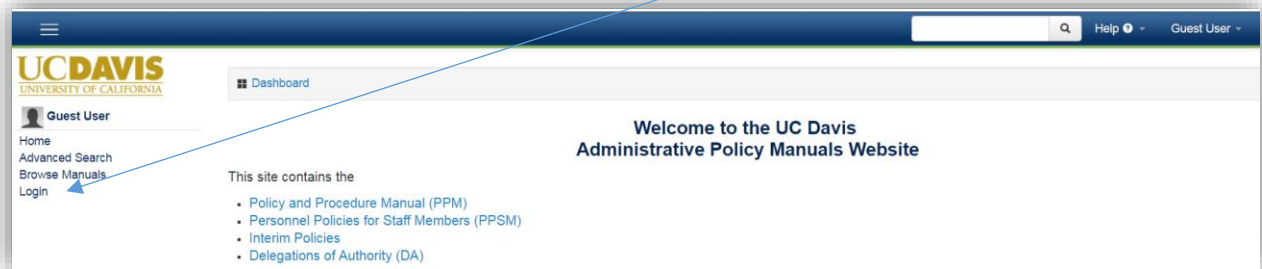


Providing Policy Input

1. The policy management system will send a weekly email with your assigned tasks; however, the Policy Office will send you an email request to notify you when your input is requested.
2. Click on the link in the email to navigate to your Tasks in the system

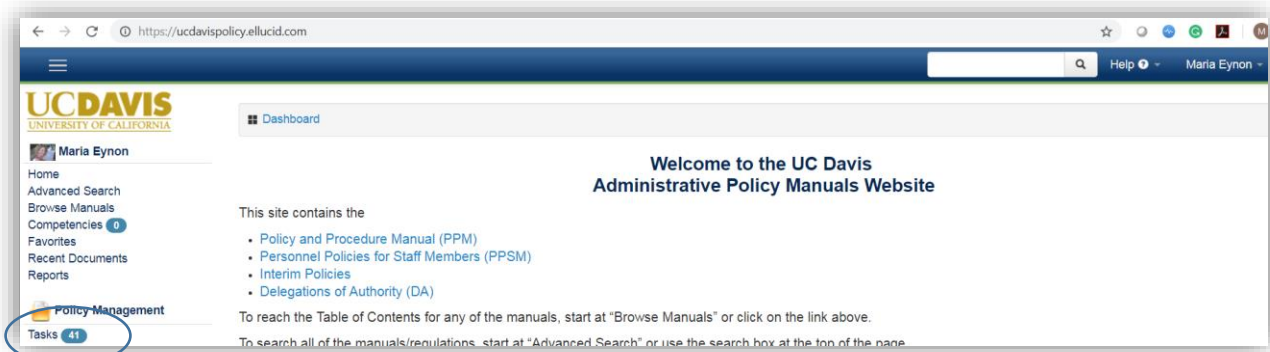


- a. If you are not already logged in, select **Login** from the homepage.



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 Overdue

Display Only Tasks Where Task Start Date Is From To

Apply

Tasks

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

Copy CSV PDF Print Export all

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

Development and Management of Campus Administrative Policies Due: Jun 1, 2018

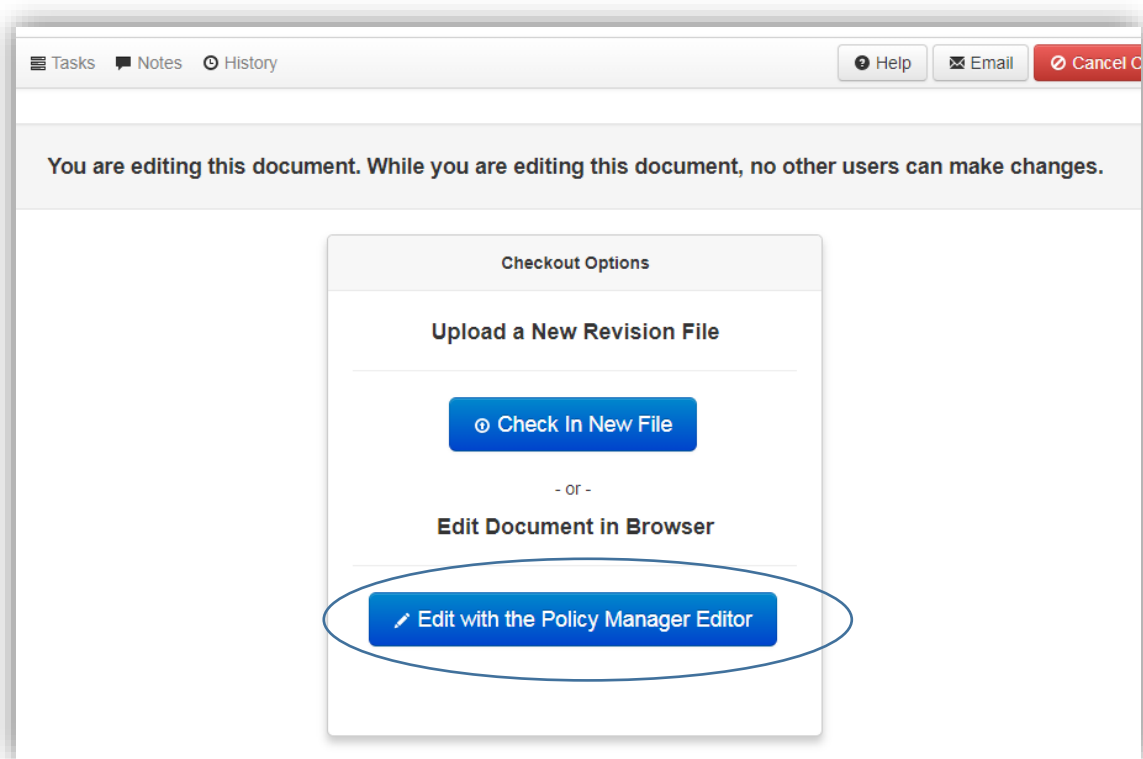
Path: / Manuals / Policy and Procedure Manual (PPM) / Introduction

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.

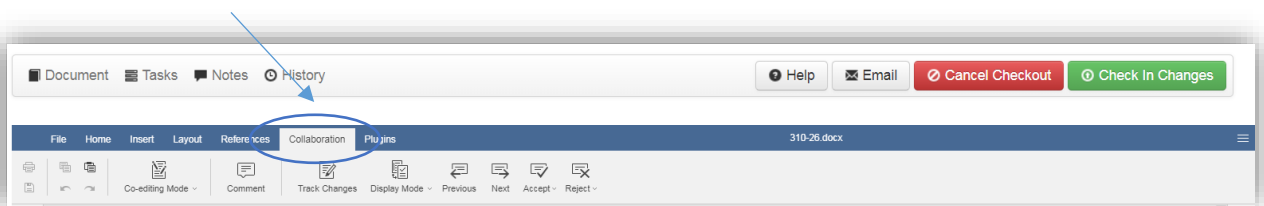
Document Tasks Notes History **New Note** Help Email **Checkout** Approve Reject

UC Davis Policy and Procedure Manual
Introduction
Development and Management of Campus Administrative Policies
Date: 02/11/18-0017
Supersedes: 1/30/12/14/140
Responsible Department: Offices of the Chancellor and Provost
Source Document: N/A

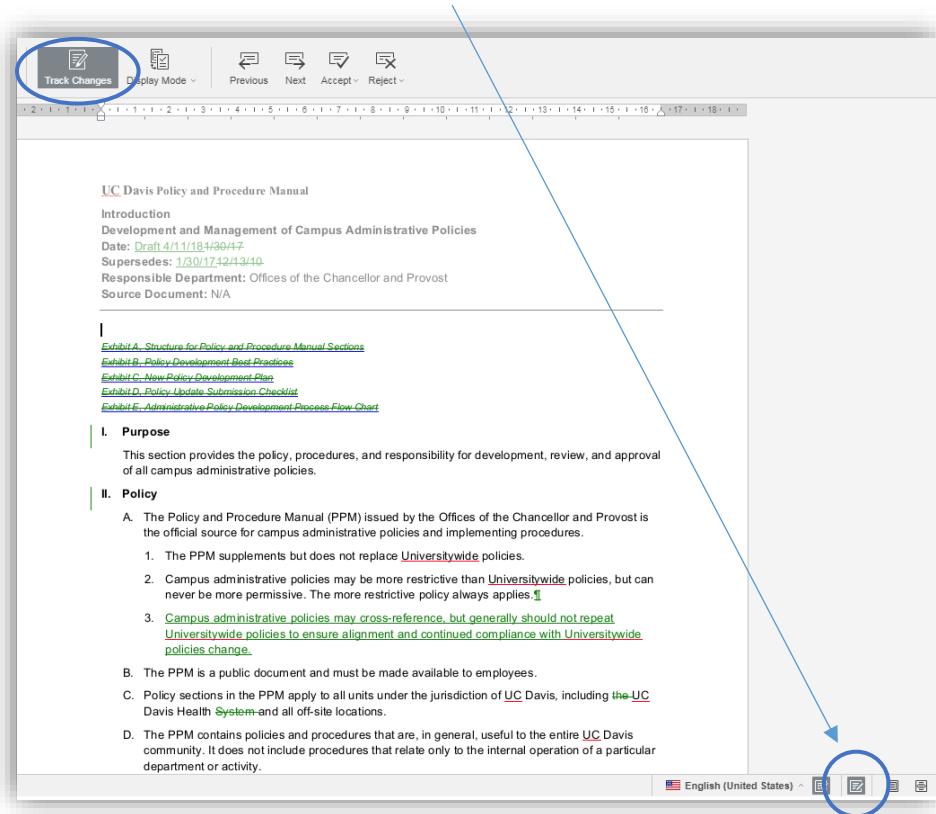
5. Select **Edit With the Policy Manger Editor** to open the document in the inline editor.



- a. Do not check in a new file (upload) without consulting with the Policy Office first.
6. Select the **Collaboration** tab.



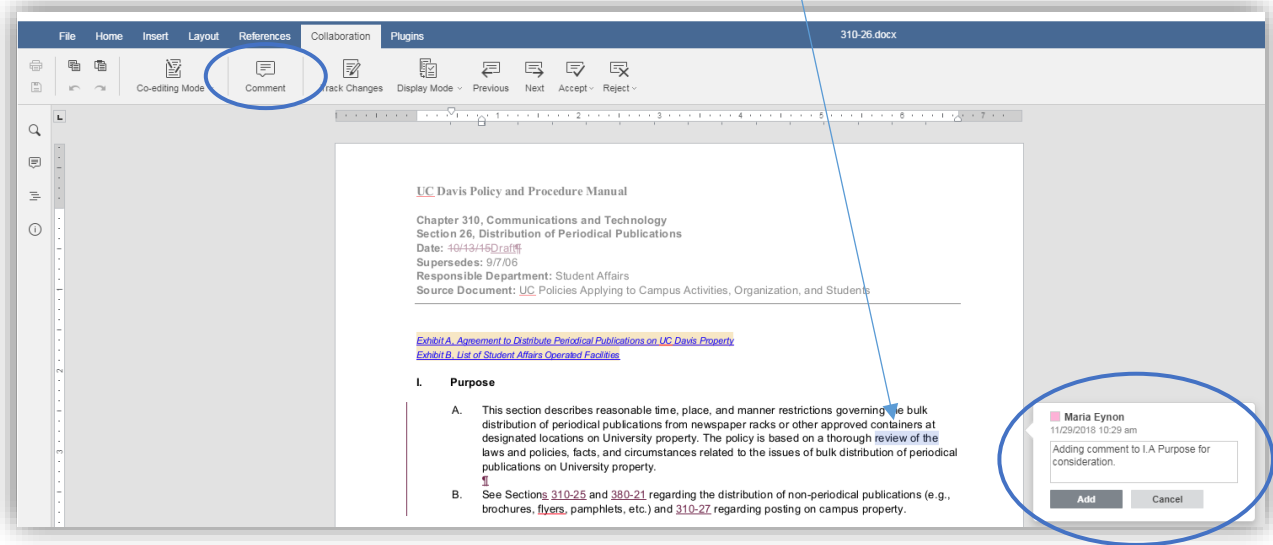
7. Turn on Track Changes to ensure all changes made are tracked for Reviewers and Approvers to identify.



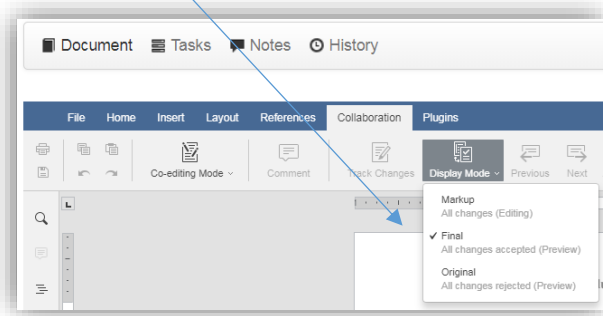
8. To enable Track Changes, select either of the Track Changes buttons. The track changes button at the top of the document can be accessed in the Collaboration tab.

9. Enter your changes directly in the document draft 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 check out, click on highlighted text.

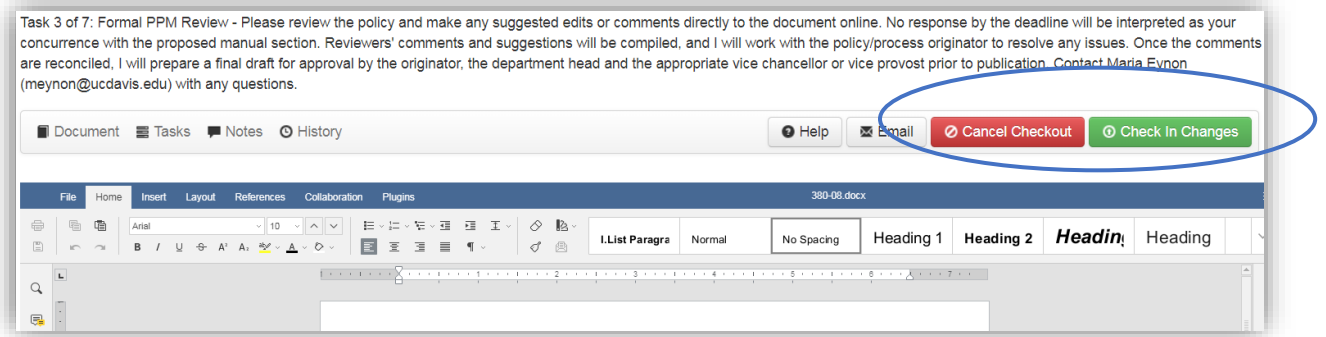


- Updates to numbering and formatting in the document are made through the **Home** tab.
- To view the document without the tracked changes showing, select the **Collaboration** tab, **Display Mode**, **Final All changes accepted (Preview)**.



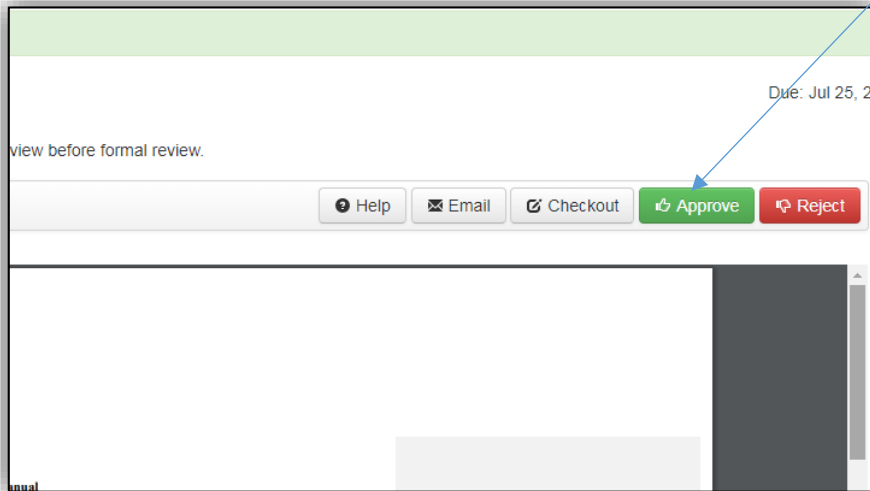
Note: Additional changes cannot be made in this view.

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.

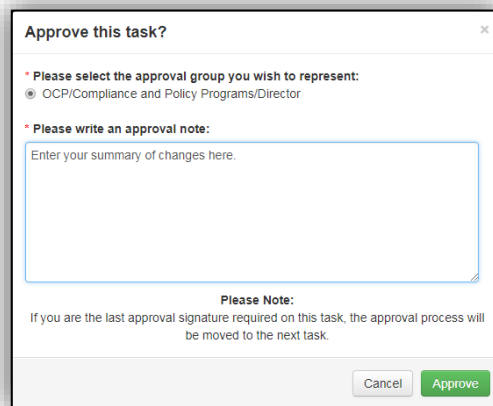


11. If you need to close the document without saving changes, select **Cancel Checkout**.

12. When you are ready to submit the policy into the review process, click **Approve**.

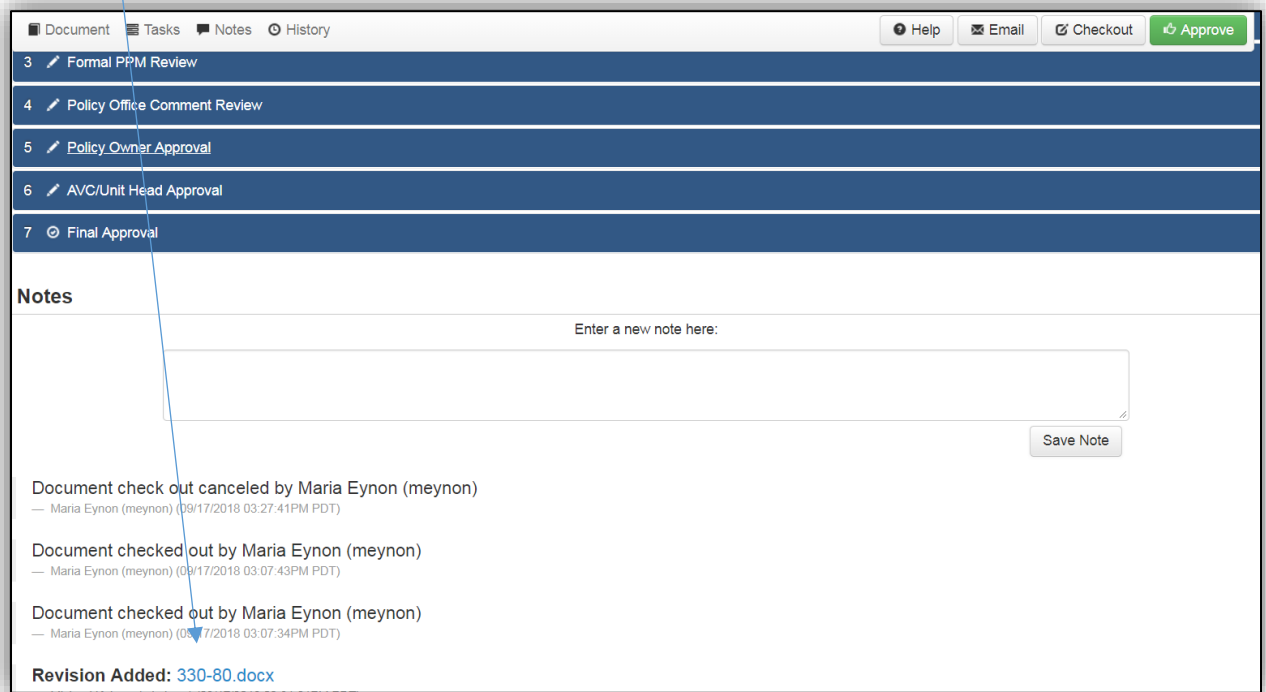


13. Enter a summary of your changes in the text box and select **Approve**.



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 displays a document management interface. At the top, there is a navigation bar with tabs for 'Document', 'Tasks', 'Notes', and 'History'. On the right side of this bar are buttons for 'Help', 'Email', 'Checkout', and 'Approve'. Below the navigation bar is a list of tasks:

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

Below the tasks is a section titled 'Notes'. It contains a text input field with the placeholder text 'Enter a new note here:' and a 'Save Note' button. Below the input field, there are three entries:

- 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, there is a link: **Revision Added: 330-80.docx**. A blue arrow points from the 'Revision Added' text in the instruction above to this link in the screenshot.