Guest Users

1. Access the UC Davis policy manuals at policy management system (no login required). The homepage includes the following (also available to UC Davis affiliates):
   - Policy and Procedure Manual (PPM)
   - Personnel Policies for Staff Members (PPSM)
   - Delegations of Authority (DA)
   - Search & Advanced Search
   - Browse Manuals
   - Policy Quick Reference
   - Help

2. Use Search or Advanced Search to search within specific manual(s).
   - Select Advanced Search in the navigation menu to refine your search.
- Use drop down menus to limit search results.

3. Manuals contain a **Folder Structure** by policy chapter. Each folder contains a list of documents in that chapter.
   - Select a folder to access the list of documents available.
4. Select a Document link from the list to view the policy.

5. The Policy Document Page will open and includes the following information:

- Breadcrumbs allow you to navigate back to the chapter listing, the policy listing, or the list of manuals.
- Links to related UC Davis policies referenced in the policy and Revision history. Select the + to expand the list of related documents.
- Links to external documents referenced in the policy.
- Select Approval Details to view date approved and approved by.
- Use the scroll bar to view the rest of the policy.
- Print the document.
6. To access policies and any relevant delegations of authority organized by common tasks or topics, select **Policy Quick Reference** link on the homepage.

- Select a **Folder** with the topic of interest to view the policies and/or delegations that are related.

- Select the **Document** to view the policy or delegation for a topic.
UC Davis Affiliates

Individuals affiliated with UC Davis (e.g., faculty, staff) have access to the tools described in Guest Users above, as well as additional tools as follows.

1. Login to the system with your UC Davis credentials. (Suggested internet Browsers: Chrome or Firefox preferred).

2. The additional tools below are available:
   - Favorites
   - Recent Documents
   - Tasks, including a notification badge
   - Dashboard
   - My Preferences

Favorites allows you to navigate to the list of documents bookmarked

Recent Documents allows you to navigate to the list the last 50 documents viewed

Use the Dashboard to view User specific Calendar

Select Tasks to view the list of tasks assigned to you

Use My Preferences to edit the frequency of notifications or sign up for policy updates
3. From Tasks, select View next to a task to access the Document Section and complete your task (review/approve).
   - **Task Filters** allow Users to search for tasks based on task status, or a date range.

   ![Task Filters][1]

   - **Tasks** appear in three colors:
     - Black font – current.
     - Gray font – unavailable (in another step of the process or a future task).
     - Red font – overdue.
4. The **Policy Section** will open and includes:
   - File path location within the system.
   - Due date of the step in process.
   - The name of the step the process is currently on, including a description.
   - View of the document.
   - Buttons to Email, Download, Checkout, and Approve.
5. The **Tasks** below the draft Document Page includes:

- All steps in the process, select the name of the step to view the approval groups and its members.
- Type of signature required (All signatures required or any signature required).
- Members of the process (Approval Groups in red have not completed their task. Approval Groups in green have completed their task.)

- Policy Developers, Reviewers, Approvers receive an email (default weekly) with a link to pending **Tasks**. To change the frequency of notifications or to sign up for policy updates, see the process for updating **My Preferences** below.

6. The Notes section below the draft document includes:
   - A free-form text field to enter in messages that might be pertinent to the approval process.
   - Links to document files that have been added as part of the approval process.
   - Annotations about the approval process, including who checked out the document and when, and approval/rejection notes.
7. The **History** section below the draft document includes:

- An audit history of the process.
- An option to print the history of the approval process or view drafts added.

- The Policy Office is the last approver in the workflow and conducts a quality check, or makes any necessary edits based on Approver input prior policy publication.
- Upon publication of the approved policy, the old revision of the policy and full review/approval history is archived automatically.
- The full audit history is accessible by the Policy Office for future reference.
8. Access the User specific **Dashboard** from the homepage and includes a calendar that includes assigned **Tasks** by date.

- The following information is included:
  - Messages from the vendor.
  - Number of New, Active or Documents Without Processes.
  - Charts.
  - User specific calendar with tasks.

![Dashboard Image](image)
9. Go to **My Preferences** from the homepage to edit preferences, frequency of task notifications, and sign up for policy updates.

   - Edit Email Options, select the drop down menu or arrow next to your name on the upper right corner of the screen, select **My Preferences**.

   - Edit **Email Options**, as necessary, select save.

**Need Additional Assistance?**

1. Use the **Help** menu at the top of the homepage to contact the vendor MCN Healthcare to access general information about navigating the site, provide feedback or for technical support. These tools are not used for general support or to provide policy related feedback.
- Select **Contact Us** for technical support and feedback to the vendor.

- Select **Help** to access general information about navigating the site.
Use the **Chat with MCN** button at the bottom of the homepage, for technical problems/support from the vendor.

2. Contact the **Responsible Department** identified in the policy for questions about policy content. A link to the department website is provided at the top of each **Policy Document Page** under **External Links**.

3. Email **policy@ucdavis.edu** for general questions or suggestions about the administrative policy manuals, or the policy development process.