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)
   - Interim Policies
   - 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.

Use Search, Advanced Search or Browse Manuals to find policies
Links to Manuals & Policy Quick Reference
Use Help for general questions or site navigation assistance.
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 external documents referenced in the policy.
   - Links to related UC Davis policies referenced in the policy and Revision history. Select the + to expand the list of related documents.
   - 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/academics, staff) have access to the tools described in \textit{Guest Users} above, as well as additional tools as follows.

1. Login to the system with your UC Davis credentials via Single Sign On /SSO through the Central Authentication Service CAS (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
- Use My Preferences to edit the frequency of notifications or sign up for policy updates
- Select Tasks to view the list of tasks assigned to you
3. From Tasks, select View next to a task to access the Document Section (document draft) and complete your task (review/approve).

- Task Filters allow Users to search for tasks based on task status, or a date range.

- 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.

- To take action on a task see **Policy Reviewers: Providing Policy Input**, **Policy Approvers: Providing Final Policy Approval**. Additional guidance, instructions and a video is available at **Help Completing a Task**.
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 (e.g., summary of changes, individuals consulted as part of the update, questions, etc.)
- 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.

Add your input or comments in Notes

Download draft versions added that include comments and changes tracked

View approval process activity
7. The **History** section below the draft document includes:
   - A full audit history of the process.
   - An option to print the history of the approval process or view drafts (revisions 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.

<table>
<thead>
<tr>
<th>Type</th>
<th>Task</th>
<th>Created By</th>
<th>Note</th>
<th>Created On</th>
</tr>
</thead>
<tbody>
<tr>
<td>Note</td>
<td></td>
<td>Maria Bynon (meynon)</td>
<td>Document check out canceled by Maria Bynon (meynon)</td>
<td>05/01/2018 09:33:19AM PDT</td>
</tr>
<tr>
<td>Note</td>
<td></td>
<td>Maria Bynon (meynon)</td>
<td>Document check out canceled by Maria Bynon (meynon)</td>
<td>04/19/2018 11:01:42AM PDT</td>
</tr>
<tr>
<td>Note</td>
<td></td>
<td>Maria Bynon (meynon)</td>
<td>Document check out canceled by Maria Bynon (meynon)</td>
<td>04/12/2018 01:42:10PM PDT</td>
</tr>
<tr>
<td>Note</td>
<td></td>
<td>Maria Bynon (meynon)</td>
<td>Document check out canceled by Maria Bynon (meynon)</td>
<td>04/04/2018 01:01:37AM PDT</td>
</tr>
<tr>
<td>Revision</td>
<td></td>
<td>Maria Bynon (meynon)</td>
<td>Revision Added: 290-10.docx</td>
<td>04/12/2018 10:39:21AM PDT</td>
</tr>
<tr>
<td>Note</td>
<td></td>
<td>Maria Bynon (meynon)</td>
<td>Document check out canceled by Maria Bynon (meynon)</td>
<td>04/04/2018 11:03:32AM PDT</td>
</tr>
<tr>
<td>Note</td>
<td></td>
<td>Maria Bynon (meynon)</td>
<td>Document check out canceled by Maria Bynon (meynon)</td>
<td>04/04/2018 11:03:32AM PDT</td>
</tr>
<tr>
<td>Note</td>
<td></td>
<td>Duane Lindsay (dilind)</td>
<td>Document check out canceled by Duane Lindsay (dilind)</td>
<td>03/08/2018 03:28:17PM PST</td>
</tr>
<tr>
<td>Note</td>
<td></td>
<td>Duane Lindsay (dilind)</td>
<td>Document check out canceled by Duane Lindsay (dilind)</td>
<td>03/08/2018 03:18:43PM PST</td>
</tr>
<tr>
<td>Note</td>
<td></td>
<td>Duane Lindsay (dilind)</td>
<td>Document check out canceled by Duane Lindsay (dilind)</td>
<td>03/08/2018 03:18:18PM PST</td>
</tr>
<tr>
<td>Revision</td>
<td></td>
<td>Duane Lindsay (dilind)</td>
<td>Revision Added: 290-10.docx</td>
<td>03/08/2018 03:18:18PM PST</td>
</tr>
<tr>
<td>Note</td>
<td></td>
<td>Duane Lindsay (dilind)</td>
<td>Document check out canceled by Duane Lindsay (dilind)</td>
<td>03/08/2018 03:08:22PM PST</td>
</tr>
<tr>
<td>Note</td>
<td></td>
<td>Duane Lindsay (dilind)</td>
<td>Document check out canceled by Duane Lindsay (dilind)</td>
<td>03/08/2018 03:08:22PM PST</td>
</tr>
<tr>
<td>Note</td>
<td></td>
<td>Maria Bynon (meynon)</td>
<td>Made edits and comments for testing purposes.</td>
<td>03/05/2018 02:38:05PM PST</td>
</tr>
</tbody>
</table>

- View note and revision activity by member and date.
- Print the audit history.
- Download draft versions added.
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.
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.