TotalCompliance©
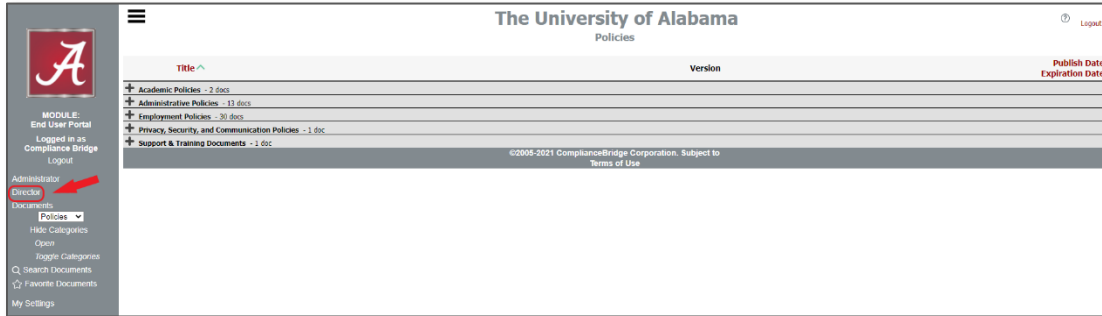# Policy Editor Quick Start Guide

Contents

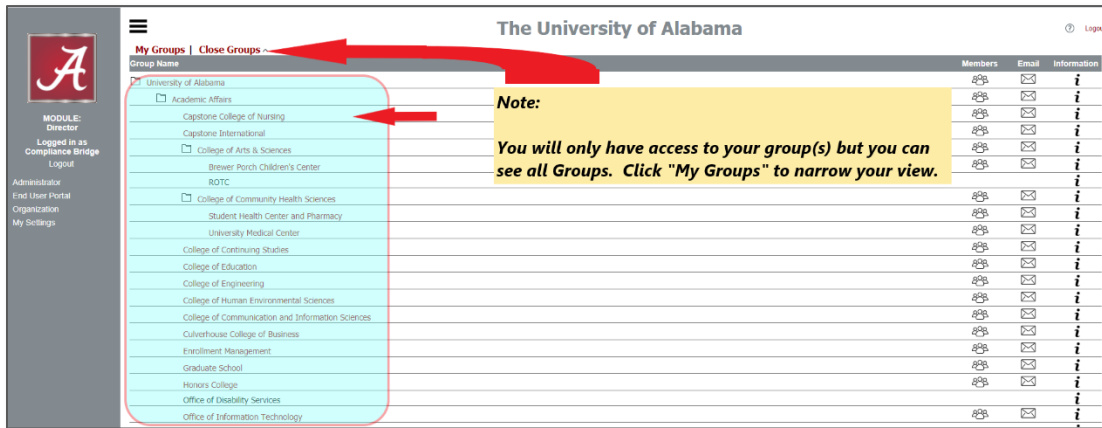*TotalCompliance©* **Policy Editor Quick Start Guide**

Section A: Policy Creation Process (New Policy Document)
Create a Draft

1. Log in to ComplianceBridge using your local site credentials. Single Sign-On access begins in **End User Portal** module. To access your policies, click on **Director**.

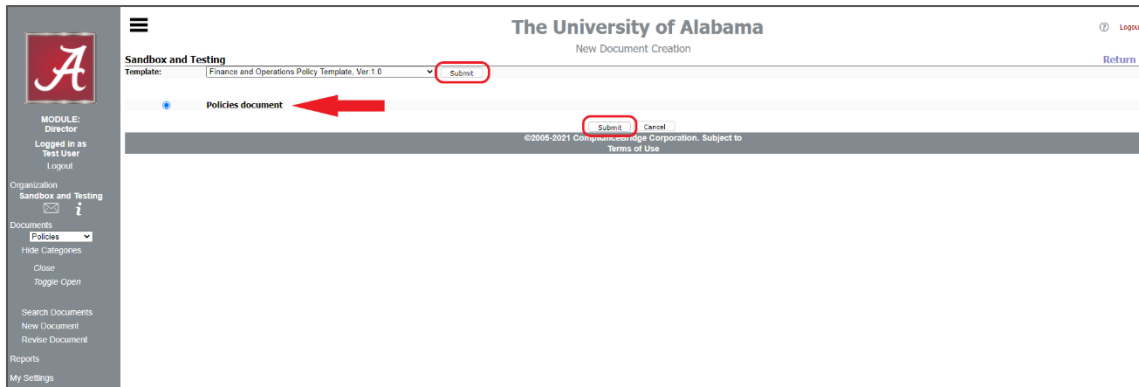2. In the Organization dashboard, click to select your *Group*.

3. Next, select **New Document**.

TotalCompliance© Policy Editor Quick Start Guide

4. Use the pull-down menu to select a **Template**. Click **Submit** button next to template pull-down menu. Next, click the radio button in front of Policies document. Click **Submit**.

5. Complete **Document Properties** and all other document metadata on this page (i.e., Document Title).


6. Choose a **Category** for Public Site distribution.

    Note: The category structure on the public site is based on the subject matter of the policy, NOT necessarily the department who owns the policy. Choose the ONE category that best matches the content of the policy.

7. When all fields are completed on this page, click **Save**.

8. In the list of your Drafts folder, click on the **Document Title** to navigate to the Document Editing dashboard.

9. Your document has been sectioned to allow for a Header section that will auto-populate metadata keywords. Please do not edit this section.
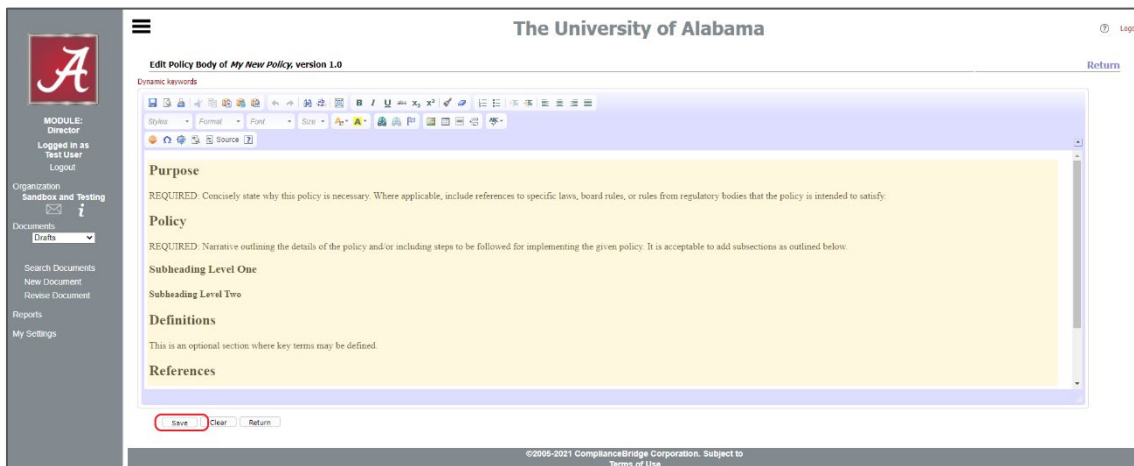
TotalCompliance© Policy Editor Quick Start Guide

Edit the Content

1. In the ***Policy Body*** section, click **Edit** to begin typing your policy using our Online Editor.
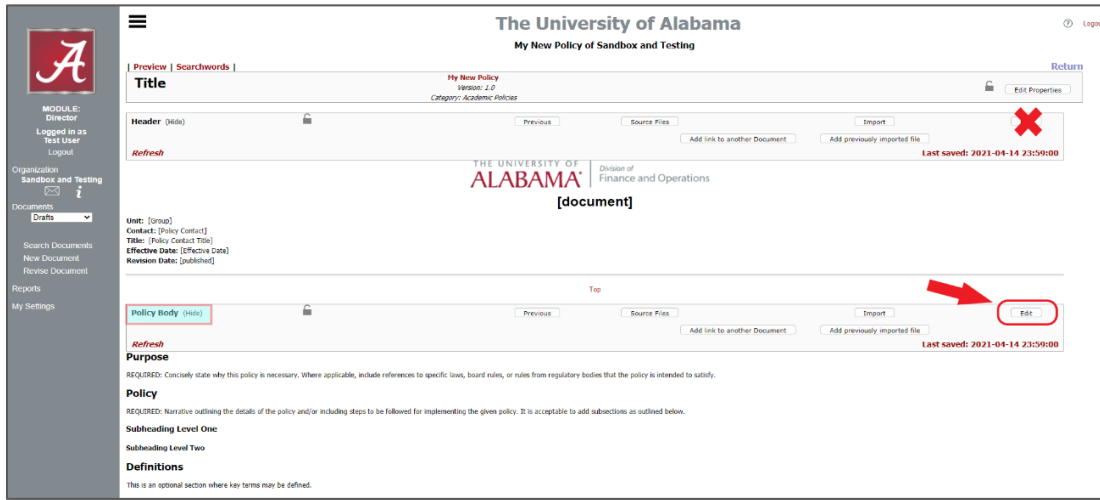
2. Use our Online Editor to produce your policy content, using the menu items to format text.

3. ***IMPORTANT! Save often and return as needed to continue editing. Do not use your browser back arrow.***

TotalCompliance© Policy Editor Quick Start Guide

Attach the Policy Tracking Form

1. You must attach your completed *Policy Tracking Form* so that it routes with this document through all collaboration and approval workflows. To do this, scroll to the bottom of the page and in the *Approval* document section, click *Import*.
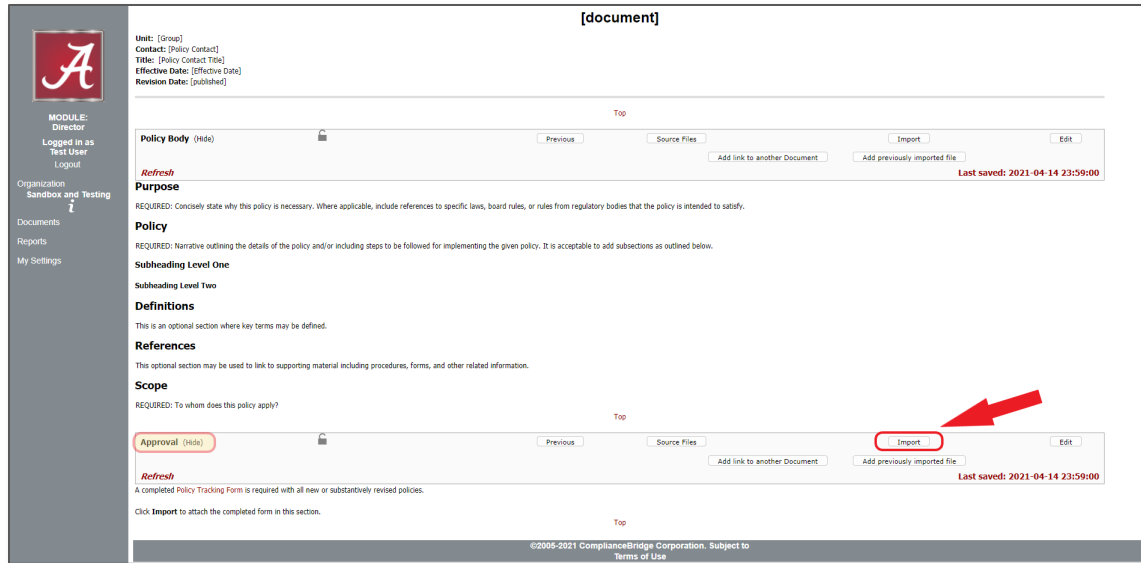
2. On the next page, click **Clear Approval before importing file**.

3. Next, you will need to Import your previously saved **Policy Tracking Form**. Click **Choose File**.

4. Navigate on your local computer or network drive to select your completed Policy Tracking Form.
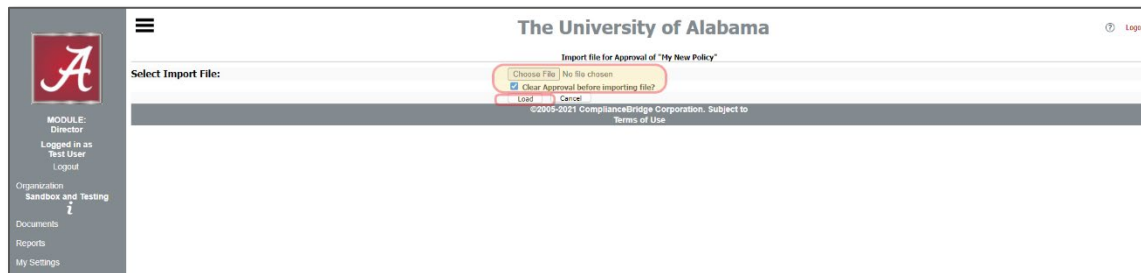
5. Once you selected your Policy Tracking Form, you will see it listed beside Choose File. Click **Load**.
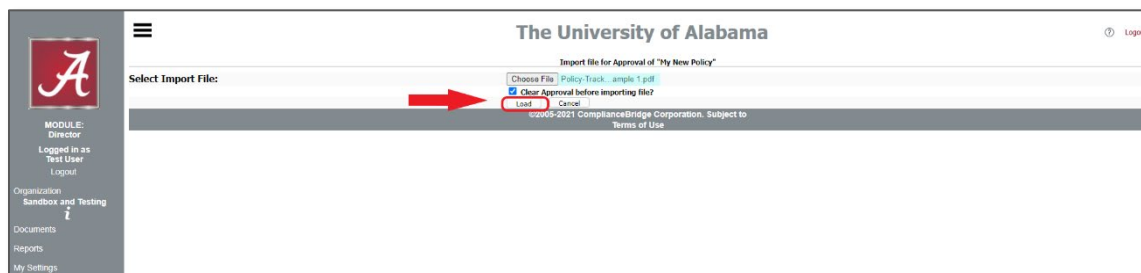
6. Click **Ignore**. This will return you to your policy in the Document Editing Dashboard.

7. When your edits and imported Policy Tracking Form are completed, you can send for collaboration and/or approvals. Please see **Section C** for instructions on how to initiate and manage workflows.

Section B: Policy Revision Process (Previously Published Policy Document)

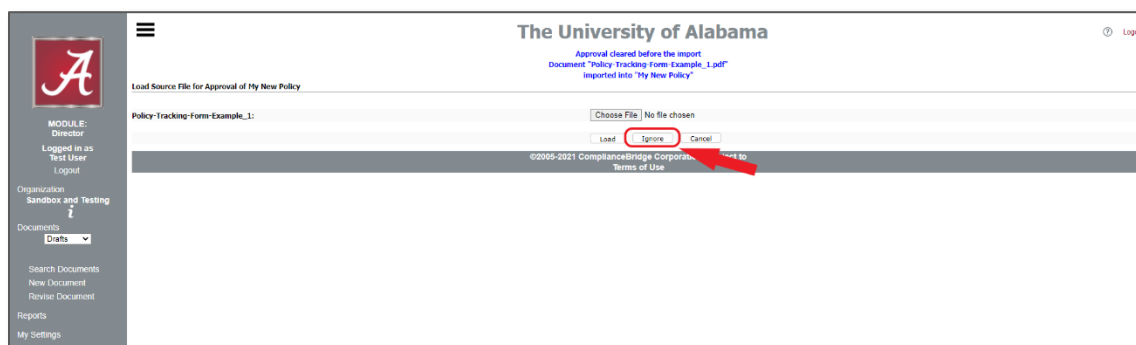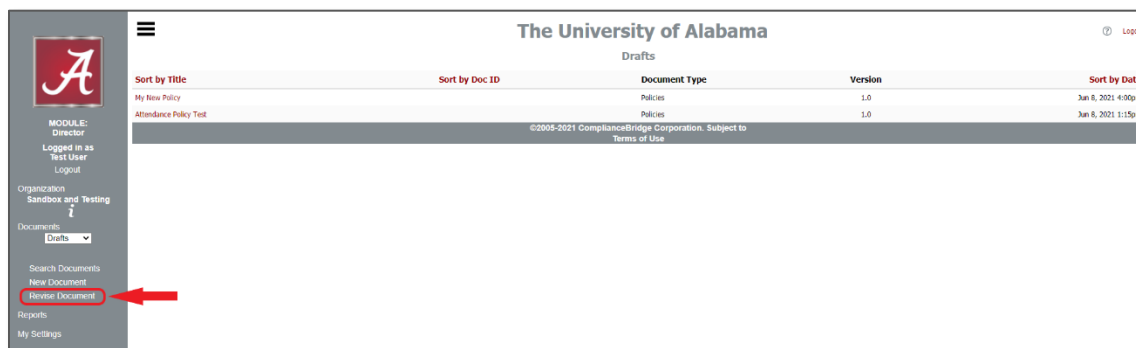1. Navigate to the appropriate policy group using *Steps #1 and #2 under Section A: Create a Draft*.

2. By default, you will find yourself in your **Drafts** folder. A listing of any/all policies in Draft will appear listed in the display area.

3. In the left side bar menu, click **Revise Document** for full access to the policies that you have access to revise.

4. The next display will provide you with opportunities to select your document for revision within your ComplianceBridge folders:

Document Type: This is your default Folder to begin a Policy Revision, but the drop-down menu will let you select your policy folders per their current status:

       Policies: Published policies/documents – This is your default Folder to begin a Policy Revision
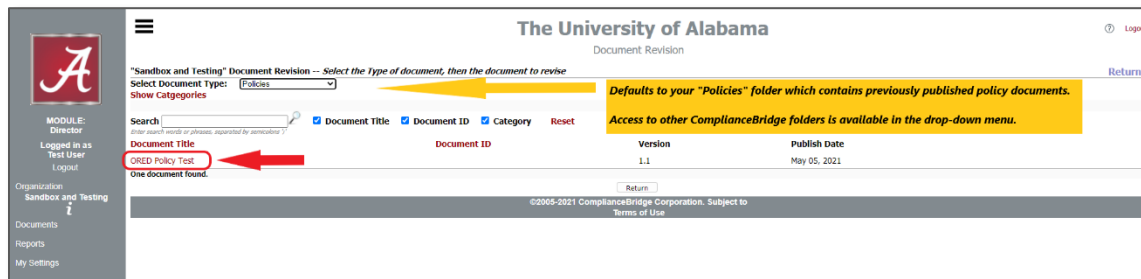
       Editable Reviewer: Documents that are already in an initiated Workflow
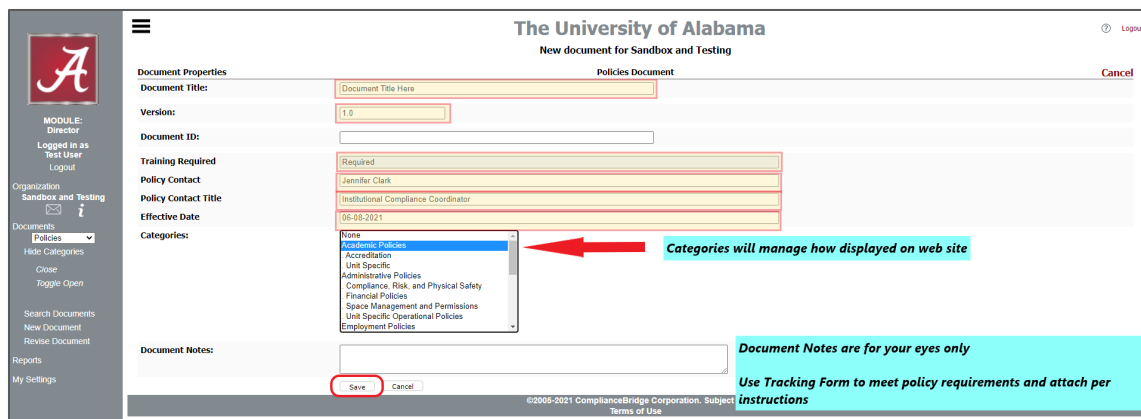
       Template Documents: Not Applicable

       Archived Documents: Not Applicable

5. Click on the **Document Title** to begin your policy revision.

6. Update the **Document Properties** and all other document metadata on this page as necessary.

   a. Verify that the Policy Contact name and title are accurate.

   b. Enter a **brief** summary of revisions in the **Document Notes** section.

7. When all fields are completed on this page, click **Save**.

8. Follow the instructions in **Section A: Edit the Content**.

9. If the policy has been substantively revised, a policy tracking form is required. Follow the instructions in **Section A: Attach the Policy Tracking Form**.

10. When your edits and imported Policy Tracking Form are completed, you can send for collaboration and/or approvals. Please see **Section C** for instructions on how to initiate and manage workflows.

Section C: Initiate and Manage Workflow for Collaboration and Approval

Policy editors are expected to obtain appropriate approvals at the department and AVP/Dean level prior to forwarding the draft to the University Policy Manager for final review and approval.

The University Policy Manager will have the draft reviewed by the Office of Counsel, the Office of the Vice President/Provost, the Policy Advisory Review Committee (PARC), and the System Office. Once all appropriate approvals have been obtained, the University Policy Manager will publish the new version.

TotalCompliance© Policy Editor Quick Start Guide

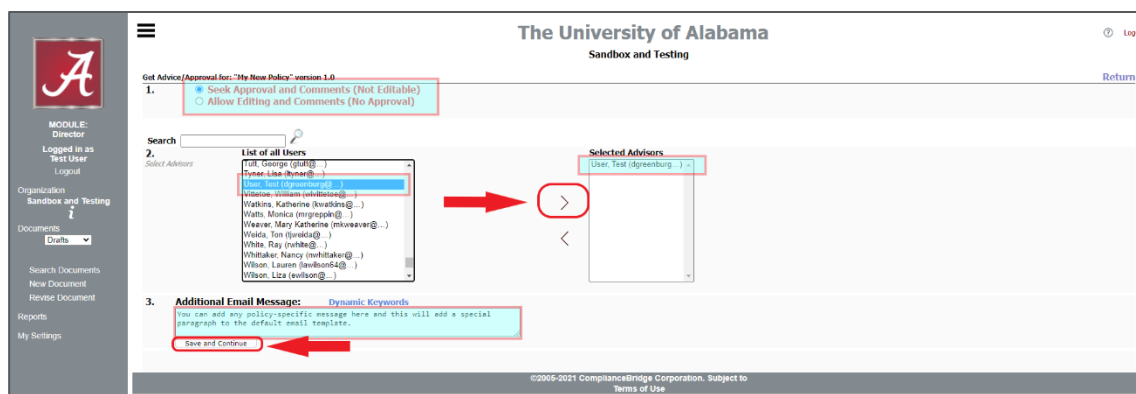1. From the Document Editing Dashboard, click **Seek Advice/Approval**.
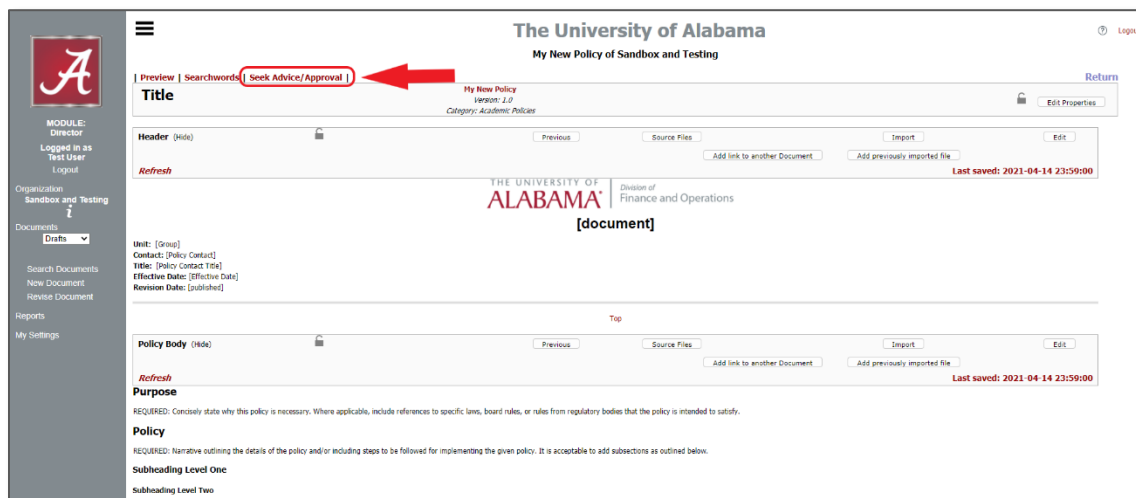
2. The next display will provide flexible options to configure each workflow according to document-specific requirements.

Section 1: Choose the appropriate option.

- **Seek Approval and Comments (Not Editable):** Sends an email to your chosen recipients with a document link providing direct navigation to the document in their Reviewer folder. Recipients will be able to view but NOT edit your policy. Comments/feedback is provided but not mandatory. Recipients will be asked to **Approve** or **Reject** your workflow.

  NOTE: This option locks the draft from editing for ALL future reviewers. If this option is selected, you will not have the choice to allow subsequent reviewers to have edit privileges unless you start a new draft.

- **Allow Editing and Comments (No Approval):** Sends an email to your chosen recipients with a document link providing direct navigation to the document in their Reviewer folder. Recipients will be able to view and/or edit the document, working directly in your policy/document. Comments/feedback is provided but not mandatory. Recipients will be asked to **Submit** their edits and/or comments.

Section 2:

Choose workflow recipients from the **List of All Users** in the left column.

You can use the search function, searching by recipient last name (type in last name and click magnifying class icon).

TotalCompliance© **Policy Editor Quick Start Guide**

Click on the recipient(s) name to highlight and use the large right arrow to move recipients in the right column list of **Selected Advisors**.

Important Tip: Put yourself in the workflow also so that you will have more managerial workflow functionality.

Section 3:

Use the text box to ADD to the default email template. This gives you the opportunity to add any notes to the recipients specific to this policy revision such as deadlines for review/approval, etc.

To add to the email template for this policy workflow, type your message in the text box provided.

Once you have made your selections on this page, click **Save and Continue**.

Section 4:

Provides advanced workflow staging, not applicable to your implementation.

Section 5:

Click **Send Now**.

Your revision in workflow will reside in your "Reviewer" folder within ComplianceBridge.

You will receive email status notifications when recipients edit, submit and/or approve. You will also receive a final email once all recipients have responded to let you know the document status is reading for publication.

Section D: Send to University Policy Manager

When ready for publication, repeat **Section C: Steps 1 and 2** to send your policy via a Seek Advice/Approval workflow to the UA Policy Manager, who will be responsible for final review and publication.

Please make sure you choose to send this workflow to **Allow Editing and Comments**.

The publication process will display your new or revised policy on the public UA Policy webpage.