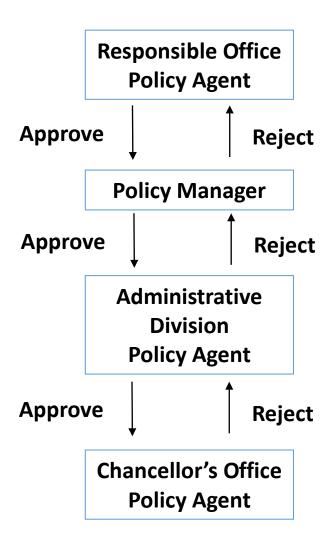
# **Policy Administration System**

The University of Mississippi Responsible Office and Administrative Division Agent Interfaces

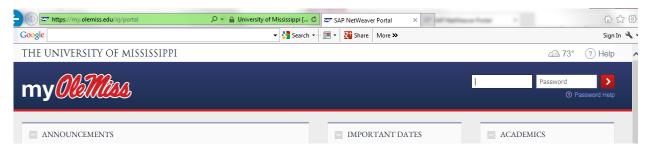
05/2015

# **Policy Approval Process**

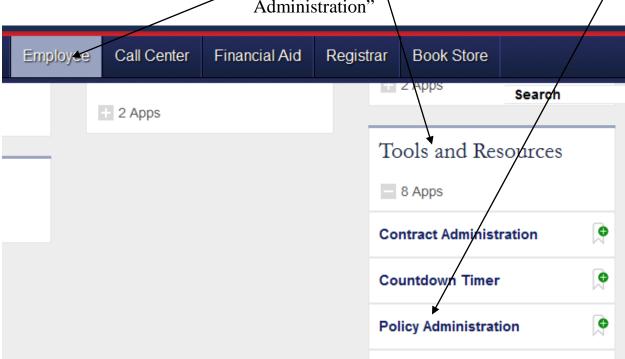


# Responsible Office Policy Agent Interface

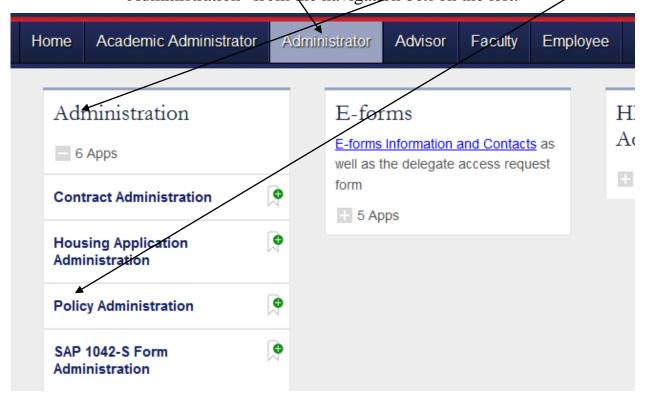
**Entering the interface:** On the Portal home page use your WebID and password to log on to myOleMiss.

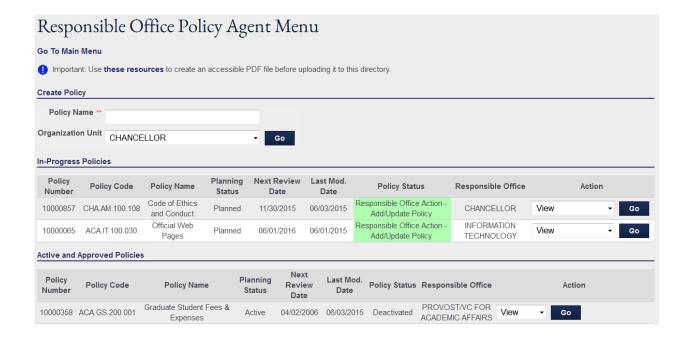


For an **Employee**: Click on "Employee" then "Tools and Resources". Choose "Policy Administration"

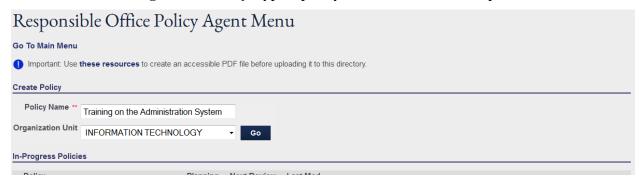


For an **Administrator**: Click on "Administrator" then "Administration". Choose "Policy Administration" from the navigation box on the left.





## Creating a New Policy: type a policy name into the textbox provided,



## The following message will be displayed. Click on the *Edit this Policy* link



Editing A Policy: The following *Edit Policy* Screen will be displayed.

Edit Policy	Ç •			
Policy Number	10000867			
Policy Name **	Training on the Administration System			
Policy Code ** (Policy Code		IT - Information Technolog	y • 300 . 070	
Naming Conventions)  Next Review Date	Search Policies By Policy Code			
Next Review Date	1 Year Later 18 Months Later 2 Years Later			
Historical Date	Did this policy exist prior to Spring 2005? © Ye	es   No		
Summary/Purpose **	The purpose of this policy is to define Policy Administration System.	ne the procedure for trai	ning on the	
Related Policies **	Policy Number		Policy Na	ime
		No data	available.	
Related Resources ***	Name		URL	
	The following related resources, if any, will be added	No data	available.	
			The URL should start with "http://" or "https://".	
People Affected **	✓ALL	ALUMNI	□ CONTRACTORS	
		STAFF VISITORS	☐ STUDENTS	
Key Words **				
Notes (view notes)			A	
PDF File to Upload	Browse No file selected. PDF files up 11821938_plan.pdf	ploaded to this directory must mee	accessibility requirements. Resources are availab	ole to assist you.
Reset Cancel	Submit			
	words can be edited after this policy is approved.			

Enter your Policy Code

Policy Code naming convention help - Use the drop down boxes for the prefix (first 2 boxes) and type the suffix.



Choose or Enter the *Next Review Date* for this policy. (2 years maximum)

Next Review Date	e © 6 Months Later						
	1 Year Later						
	18 Months Later						
	© 2 Years Later						
	•	6	•	3	<b>~</b>	2016 -	(MM-DD-YYYY)

Historical Date: Choose the appropriate response. If yes, drop down boxes to enter the date will appear:

Historical Date Did this policy exist prior to Spring 2005? 

✓ Yes 

No

If yes, Do you know the date when it become effective? 

Yes 

No

1 

1 

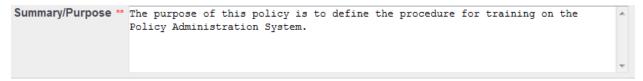
2005 

(MM-DD-YYYY)

Historical Date Did this policy exist prior to Spring 2005? O Yes No

Choose a date, or if you don't know leave blank. (If you leave this blank, the Policy Directory will show "Prior to Spring 2005" for date)

Cut and paste or type the Policy *Summary/Purpose* into the text box. The text of the Summary/Purpose is searched to locate Policies on the



**Related Policies** will be added after the Policy is live on the Policy Directory.

Attach any needed *Related Resources*.

More resources can be added after the policy is live on the Policy Directory.

Help on related resources

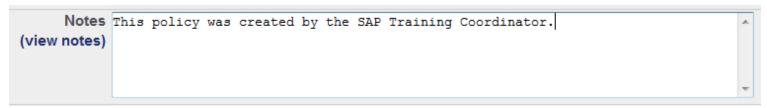
A. Enter a name for the resource (Displayed to users on the Web)



Check the boxes next to all groups of *People Affected* by this policy.



Enter any *Notes* on the policy.



Click on the *Browse* button next to the *File to upload* box to select your PDF file. (The actual text of the policy should be contained in this file and must be in PDF format. Use the <u>Policy Template</u> to make sure your policy

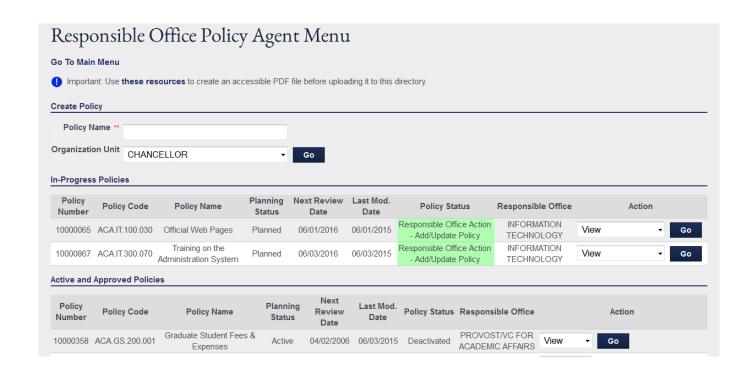


Click Submit to when you are finished editing your policy. The following message will be displayed.

From this screen you may: Edit this Policy or Go to Responsible Office



**Responsible Office Policy Agent Menu**: Only Policies for your Organization Unit will be displayed here. *In-Progress Policies* are those that are not yet live on the Policy Directory. *Active Policies* are those that are live on the Policy Directory. *In-Progress Policies* that are at your level of review will be displayed with a green highlight on their status. The next review date of a policy will be highlighted in yellow if the policy is due for review within the next 3 months or in red if it is overdue for review.



**In-Progress Policy Actions:** Notice the dropdown menu in the action column for each Policy. You may *View*, *E-mail* or *Add a Note* to any policy. For policies at your level of review you may also *Edit*, *Delete* or



#### **Action: View**

The policy is shown in the form that it will be presented on the Policy Directory.



## **Action: Edit**

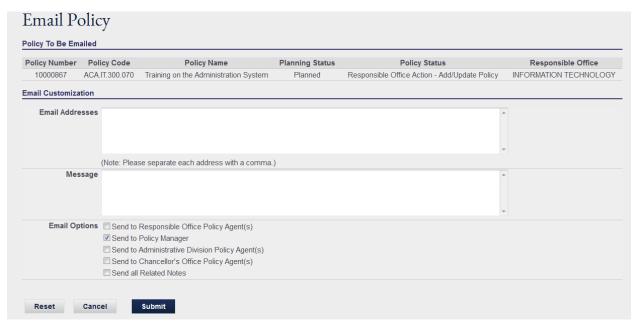
The policy is re-opened for editing.

Edit Policy							
Policy Number	10000867						
Policy Name **	Training on the Administration System						
Policy Code ** (Policy Code	ACA - Provost/Academic Affairs   ▼	. IT - Information Technolog	gy 300 . 0	70			
Naming Conventions)	Search Policies By Policy Code						
Next Review Date	© 6 Months Later © 1 Year Later © 18 Months Later © 2 Years Later © 6 ▼ 3 ▼ 2016 ▼ (MM-DD-YYYY)						
Historical Date	Did this policy exist prior to Spring 2005?   Y	es  No					
Summary/Purpose **	The purpose of this policy is to defi Policy Administration System.	ne the procedure for tra	ining on the				
Related Policies **	Policy Num	ber		Policy Name			
		No data	available.				
Related Resources ***	Name			URL			
	No data available.						
	The following related resources, if any, will be added	f:					
			The URL should start with "http://	/" or "https://".			
People Affected **	<b></b> ✓ALL	□ALUMNI	□ CONTRACTO				
	FACULTY	STAFF	■ STUDENTS				

#### **Action: Email**

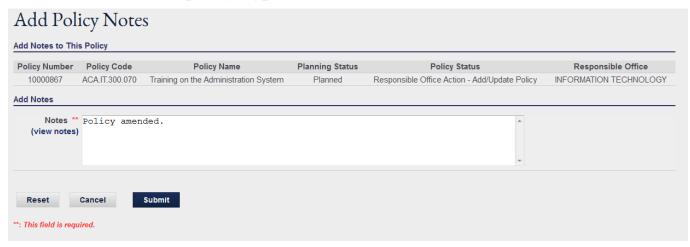
This Action sends the policy to any email address you choose.

- A. Type in *Email address* or *addresses*
- B. Enter Message.
- C. Select Email Options
- D. Click the Submit Button.



#### **Action: Add Note**

This Action adds a note to a policy. Type in the note and click on the Submit Button.



## **Action: New/Update Appr**

This action submits your policy to policy manager for approval.



#### **Action: Delete**

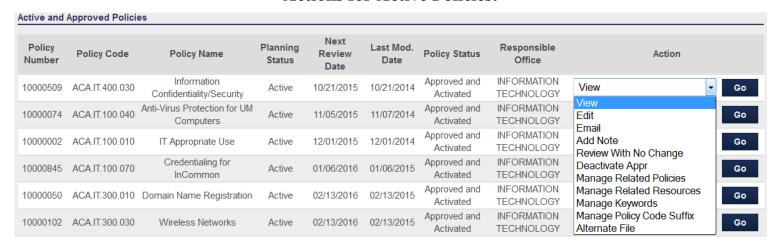
Used to permanently delete an In-Progress policy. This confirmation will pop-up. Click ok to continue deleting.



This confirmation message will appear.

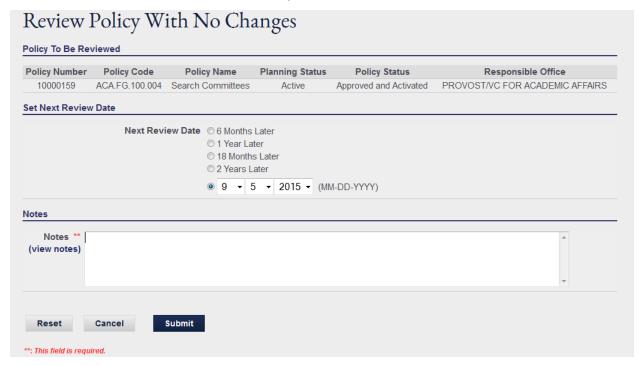


#### **Actions for Active Policies:**



### **Action: Review With No Change**

When it is time to review an existing policy, if there are no changes to be made, use this action to set the next review date and add needed notes, then click submit.



## **Action: Deactivate Appr**

If a policy needs to be removed from the Policy Directory, use this Action to submit the request to your Administrative Division Office. Add needed notes and click submit.



#### **Action: Manage Related Policies**

Once a policy has been activated on the Policy Directory, you may associate it with related policies using this Action. Choose policies to relate by clicking the checkbox next to them and then click submit.



Related Policies are displayed and linked on the Policy Directory when a policy is viewed.

## **Action: Manage Related Resources**

As stated earlier, you can add related resources to a policy after it is live on the Policy Directory.

- A. Enter a name for the resource (Displayed on the Web interface)
- B. Enter the URL (including http:// or https://)

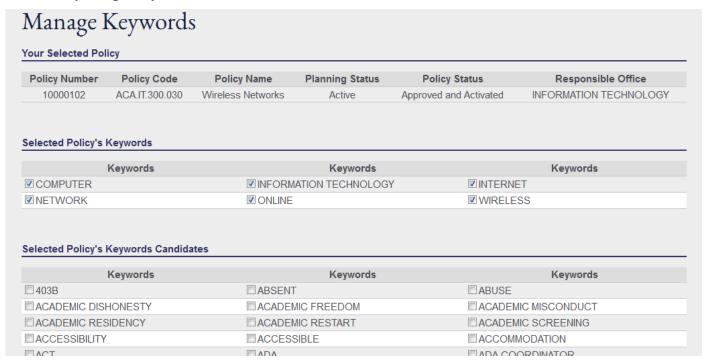
## C. Click Submit

# Manage Related Resources

## **Your Selected Policy** Policy Number **Policy Code Policy Name** Planning Status **Policy Status** Responsible Office 10000102 ACA.IT.300.030 INFORMATION TECHNOLOGY Wireless Networks Active Approved and Activated Selected Policy's Related Resources \*\*\* URL Name Office of Information Technology http://www.olemiss.edu/depts/it The URL should start with "http://" or "https://". Related Resources To Be Added To The Above Policy \*\*\* Name URL The URL should start with "http://" or "https://". Submit Reset Cancel \*\*\*: Both "Name" and "Url" are required if you choose to input a related resources entry.

#### **Action: Manage Keywords**

Keywords are used to facilitate searching policies in the Policy Directory. Users select from a dropdown box of keywords and then see all of the policies related to it. This Action relates keywords to your policy. Click the



## **Action: Manage Policy Code Suffix**

This action allows you to change the Policy Code Suffix (last 6 digits) of an active Policy, to facilitate policy organization.



## **Approved Policies**

When you approve a policy from the Responsible Office Policy Agent Interface it is sent to your Policy Manager for Proofing. It will be displayed on their interface and they may approve or reject it. If they approve it, it is sent to the Chancellor's Office Policy Agent. It will be displayed on their

interface and they may approve or reject it. Once approved, the Chancellor's Office Policy Agent activates it which posts it to the Policy Directory.

### **Editing Active Policies**

If you edit an active policy, a copy of the policy is created and placed under *In-Progress Policies* until it is approved by your *Policy Manager, Administrative Division Policy Agent, Chancellor's Office Policy Agent* and placed live on the Policy Directory. When it goes live it will replace the old version of the policy on the Policy Directory.

### **Rejected Policies**

If your policy is rejected by your *Policy Manager* then its status will return to *Responsible Office*. You may edit the policy and submit it again or delete it.

#### **Additional Features**

Policy Codes Help File: This feature shows you policy codes already in use for help in organizing new policies.

Upload Source Files for Storage: This feature allows you to upload the editable source file for your PDF. The file will not be viewable in the Policy Index, but will be available to download if you need to update a policy.

#### **Dates**

March 9<sup>th</sup>: Policy Administration System goes live.

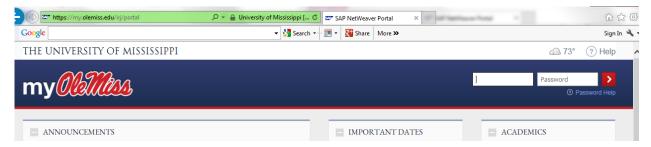
You may start uploading Policies.

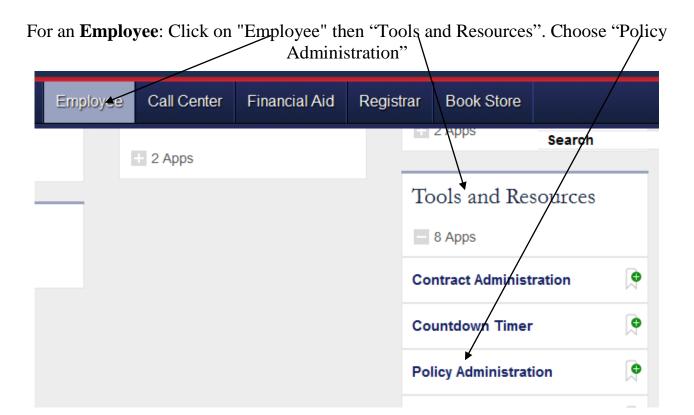
April 1<sup>st</sup>: Policy Directory goes live.

Policies in the index will be viewable on the web.

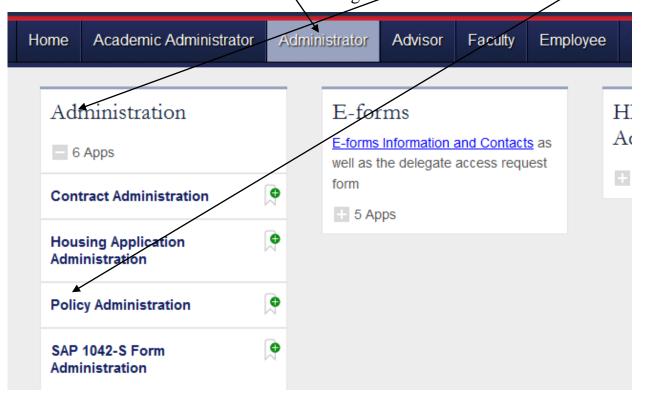
# Administrative Division Policy Agent Interface

**Entering the interface:** On the Portal home page use your WebID and password to log on to myOleMiss.





For an **Administrator**: Click on "Administrator" then "Administration". Choose "Policy Administration" from the navigation box on the left.



Administrative Division Policy Agents have a choice of either interface.



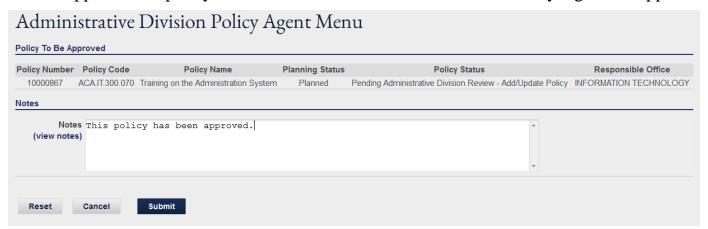
This interface is similar to the Responsible Office Interface. The difference is that you can only act

on policies that are pending at Administrative Division for review. These policies will be highlighted in Green.



## **Action: Approve New/Update**

This action approves the policy and sends it to the Chancellor's Office Policy Agent for approval



This message will be displayed

## Administrative Division Policy Agent Menu



✓ Thanks, CM Faculty9.

Your policy has been approved by Administrative Division Policy Agent(s):

Policy Name: Training on the Administration System

Administrative Division Policy Agent Menu

## **Action: Reject New/Update**

This action Rejects the new policy or changes to an existing policy and



This message will be displayed:

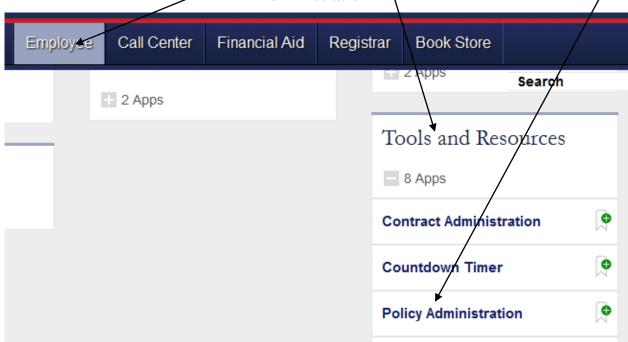


# Chancellor's Office Policy Agent Interface

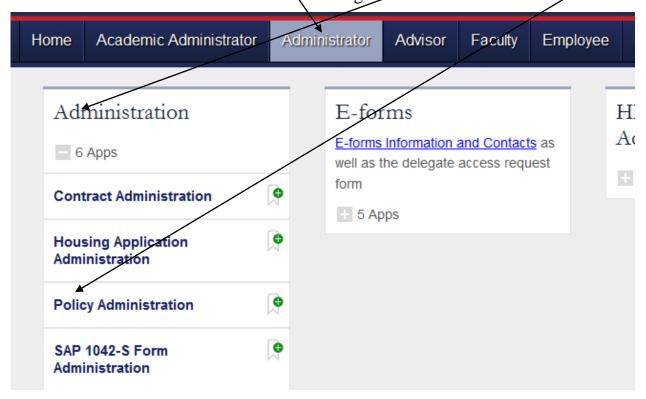
**Entering the interface:** On the Portal home page use your WebID and password to log on to myOleMiss.



For an **Employee**: Click on "Employee" then "Tools and Resources". Choose "Policy Administration"



For an **Administrator**: Click on "Administrator" then "Administration". Choose "Policy Administration" from the navigation box on the left.



Chancellor's Office Policy Agents have a choice of these three interfaces.



This interface is similar to the Administrative Division Interface. The difference is that you can only act on policies that are pending at Chancellor's Office for review. These policies will be highlighted in Green.



#### **Action: Activate**

This action activate the policy which will be live from the Policy Directory.

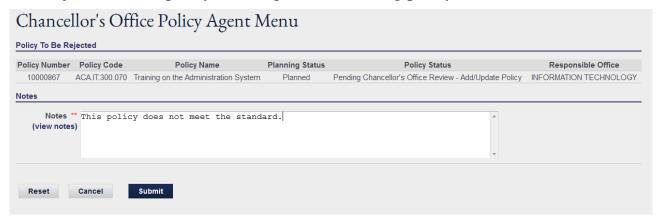


## This message will be displayed



## **Action: Reject New/Update**

This action Rejects the new policy or changes to an existing policy and



This message will be displayed:

