Policy Administration System
The University of Mississippi
Responsible Office and Administrative Division Agent Interfaces
05/2015

Policy Approval Process

- Responsible Office
  - Policy Agent
    - Approve
    - Reject
    - Policy Manager
      - Approve
      - Reject
      - Administrative Division
        - Policy Agent
          - Approve
          - Reject
          - Chancellor’s Office
            - Policy Agent
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.

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 options](image)

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

![Historical Date options](image)

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

![Summary/Purpose text box](image)

**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)

![Related Resources table](image)

Check the boxes next to all groups of **People Affected** by this policy.
Enter any \textit{Notes} on the policy.

<table>
<thead>
<tr>
<th>People Affected</th>
<th>FACULTY</th>
<th>STAFF</th>
<th>VENDORS</th>
<th>VISITORS</th>
</tr>
</thead>
</table>

Click on the \textit{Browse} button next to the \textit{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 \textit{Policy Template} 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: \textit{Edit this Policy} or \textit{Go to Responsible Office}

\textbf{Responsible Office Policy Agent Menu}: Only Policies for your Organization Unit will be displayed here. \textit{In-Progress Policies} are those that are not yet live on the Policy Directory. \textit{Active Policies} are those that are live on the Policy Directory. \textit{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

<table>
<thead>
<tr>
<th>Policy Number</th>
<th>Policy Code</th>
<th>Policy Name</th>
<th>Planning Status</th>
<th>Next Review Date</th>
<th>Last Mod. Date</th>
<th>Policy Status</th>
<th>Responsible Office</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10000065</td>
<td>ACA.II.100.010</td>
<td>Official Web Pages</td>
<td>Planned</td>
<td>06/01/2016</td>
<td>05/01/2015</td>
<td>Responsible Office Action - Add/Update Policy</td>
<td>INFORMATION TECHNOLOGY</td>
<td>View</td>
</tr>
<tr>
<td>10000876</td>
<td>ACA.II.300.070</td>
<td>Training on the Administration System</td>
<td>Planned</td>
<td>06/03/2016</td>
<td>06/03/2015</td>
<td>Responsible Office Action - Add/Update Policy</td>
<td>INFORMATION TECHNOLOGY</td>
<td>View</td>
</tr>
</tbody>
</table>

Active and Approved Policies

<table>
<thead>
<tr>
<th>Policy Number</th>
<th>Policy Code</th>
<th>Policy Name</th>
<th>Planning Status</th>
<th>Next Review Date</th>
<th>Last Mod. Date</th>
<th>Policy Status</th>
<th>Responsible Office</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10000351</td>
<td>ACA.GS.200.001</td>
<td>Graduate Student Fees &amp; Expenses</td>
<td>Active</td>
<td>04/02/2006</td>
<td>06/03/2015</td>
<td>Deactivated</td>
<td>PROVOST/VC FOR ACADEMIC AFFAIRS</td>
<td>View</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Policy Number</th>
<th>10000867</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy Name</td>
<td>Training on the Administration System</td>
</tr>
<tr>
<td>Policy Code</td>
<td>ACA - Provost/Academic Affairs - IT - Information Technology</td>
</tr>
<tr>
<td>Policy Code (Policy Code Naming Conventions)</td>
<td>300 070</td>
</tr>
<tr>
<td>Next Review Date</td>
<td>06/03/2015</td>
</tr>
<tr>
<td>Last Changed by</td>
<td>TANG, JE on 06/03/2015</td>
</tr>
<tr>
<td>Summary/Purpose</td>
<td>The purpose of this policy is to define the procedure for training on the Policy Administration System.</td>
</tr>
<tr>
<td>Historical Date</td>
<td>Did this policy exist prior to Spring 2009? Yes No</td>
</tr>
</tbody>
</table>

### Related Policies

<table>
<thead>
<tr>
<th>Policy Number</th>
<th>Policy Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>No data available.</td>
<td>No data available.</td>
</tr>
</tbody>
</table>

### Related Resources

<table>
<thead>
<tr>
<th>Name</th>
<th>URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>No data available.</td>
<td>No data available.</td>
</tr>
</tbody>
</table>

### People Affected

- [ ] ALL
- [ ] FACULTY
- [ ] ALUMNI
- [ ] STAFF
- [ ] CONTRACTORS
- [ ] STUDENTS

The URL should start with "http://" or "https://".
**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*.

![Email Policy Form]

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

![Add Policy Notes Form]
**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.

Are you sure to delete this policy?
Policy Number: 10000888

This confirmation message will appear.

Thank you, JIE TANG
Your draft policy has been deleted

Policy Name: test

Go To Responsible Office Policy Agent Menu
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
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

![Manage Keywords](image)

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.

![Manage Policy Code Suffix](image)

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\(^{th}\): Policy Administration System goes live.
- You may start uploading Policies.

April 1\(^{st}\): Policy Directory goes live.
- Policies in the index will be viewable on the web.
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.

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.
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
**Action: Reject New/Update**

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

![Administrative Division Policy Agent Menu](image)

This message will be displayed:

![Administrative Division Policy Agent Menu](image)
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:

Chancellor's Office Policy Agent Menu

Policy To Be Rejected

Policy Number  Policy Code  Policy Name  Planning Status  Policy Status  Responsible Office
10000887    ACA IT 300.070  Training on the Administration System  Planned  Pending Chancellor's Office Review - Add/Update Policy  INFORMATION TECHNOLOGY

Notes

This policy does not meet the standard.

Reset  Cancel  Submit

Chancellor's Office Policy Agent Menu

Thank you, CM Faculty9.

Your policy has been rejected by Chancellor's Office Policy Agent(s):

Policy Name: Training on the Administration System