Policy Library Training Guide

Getting Started

There are several resources available to help you familiarize yourself with the Policy Library. Navigate to policy.ku.edu and click on **Resources**, and then **Contributor Resources**.

Contributor Resources

Contributor Resources offers detailed guidance on how to:

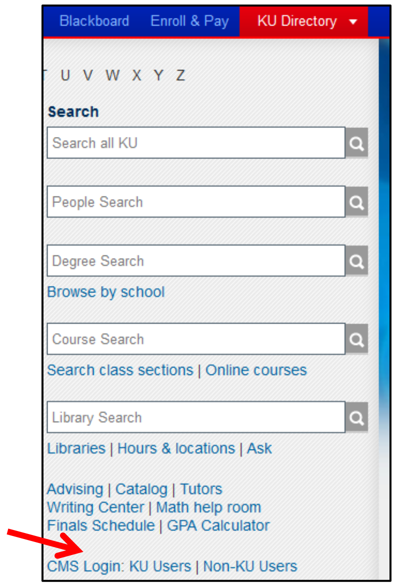
- Add new Policy Documents
- Create a page to feature PDFs, Word documents, or links that are related to policies
- Edit existing policies
- Add anchored links (a hyperlinked table of contents; when a link is clicked, the page jumps to the specified section)
- Give your policies unique URLs that are consistent with the Policy Library's standard format
- Use the Policy Development template to ensure your policy has all necessary information throughout development
- Request access to the Policy Library (to remove users, simply e-mail the request to policy@ku.edu)

If you have questions, please contact the Policy Office at 785-864-9600 or policy@ku.edu.

Logging in to the Policy Library

Navigate to policy.ku.edu and click on the red **KU Directory** link at the top right of the page.

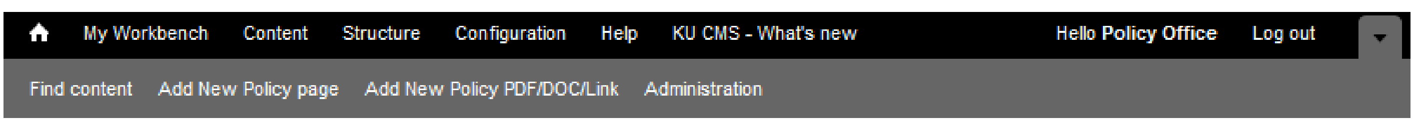
This will bring up a new box. Click on **KU Users** at the bottom-right of the box.



You will be redirected to a log-in screen; sign in with your primary KU online username and password.

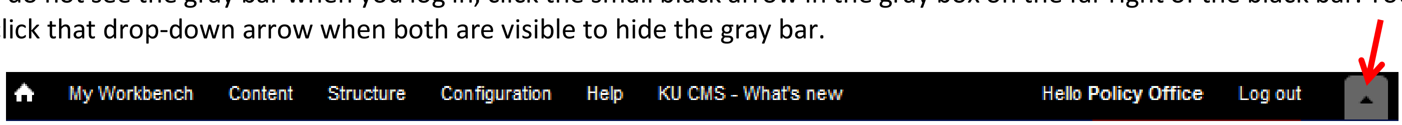
NOTE: When logging in, you have to be on policy.ku.edu. The red **KU Directory** box appears on ***all*** KU websites, and if you are anywhere other than the Policy Library, you will not be able to complete your login.

Once you are logged in, you should see a black bar and a gray bar across the top of the page.



These bars provide your administrative links; you will primarily use **Home**,  , **My Workbench**, **Content, Add New Policy page** and **Add New Policy PDF/DOC** (**Find content** is identical to **Content**).

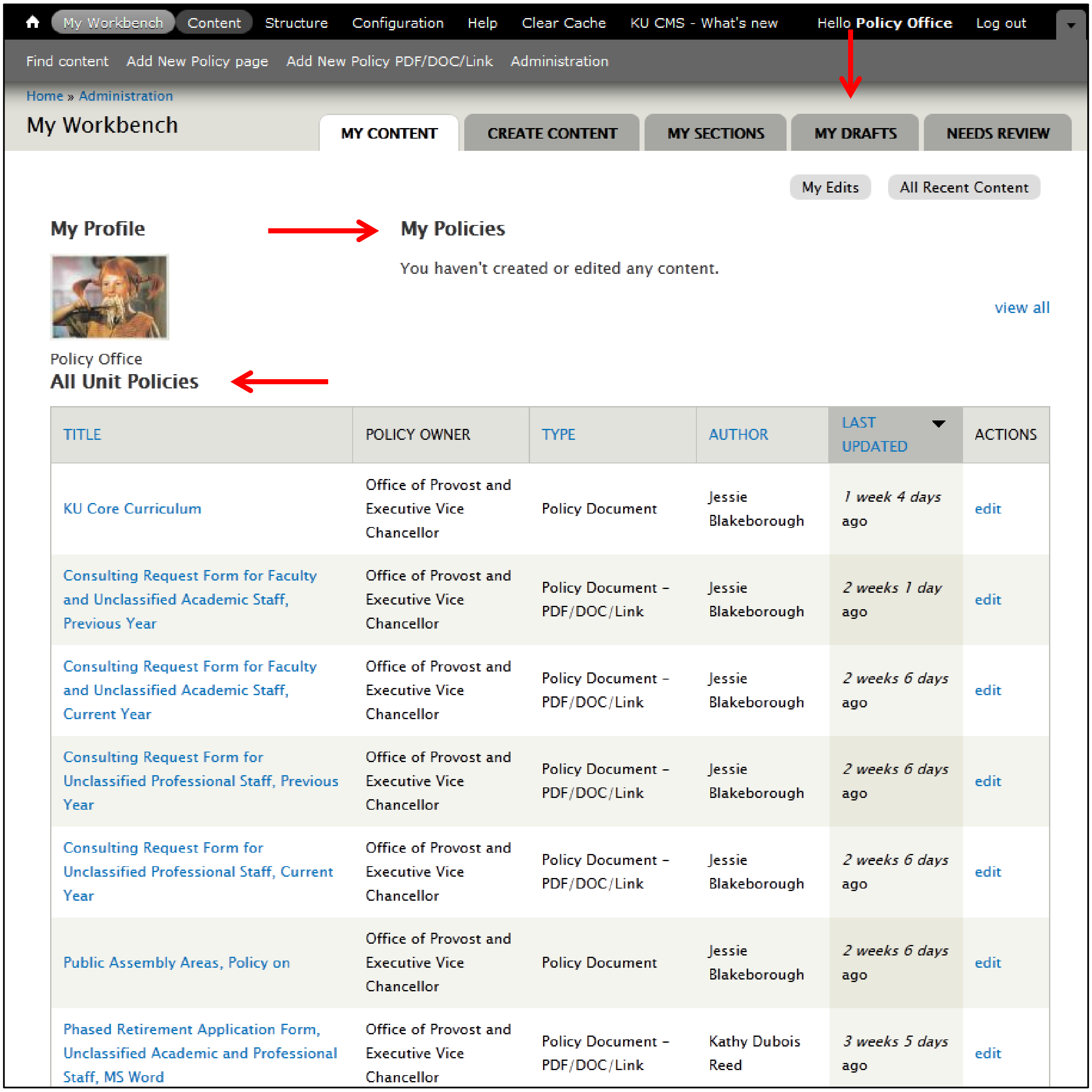
If you do not see the gray bar when you log in, click the small black arrow in the gray box on the far right of the black bar. You can also click that drop-down arrow when both are visible to hide the gray bar.



The **Log out** button is located at the far right of the top bar. If you are inactive (not making updates to a Policy Library page) for 20 minutes, you will get a notification that your session is about to expire, with a choice to reset it. If you haven't reset it after 10 seconds, you will be automatically logged out due to inactivity. You will only see the session expiration notice if you are still in your browser on another site or not using the administrative functions of the Policy Library (the message will not display over other programs, or when the browser is minimized).

Working in the Policy Library

My Workbench allows you to view all policies you've created or edited (**My Policies**, in the middle of the page) and your office's policies (**All Unit Policies**). The **My Drafts** tab shows any drafts/unpublished pages you've worked on.

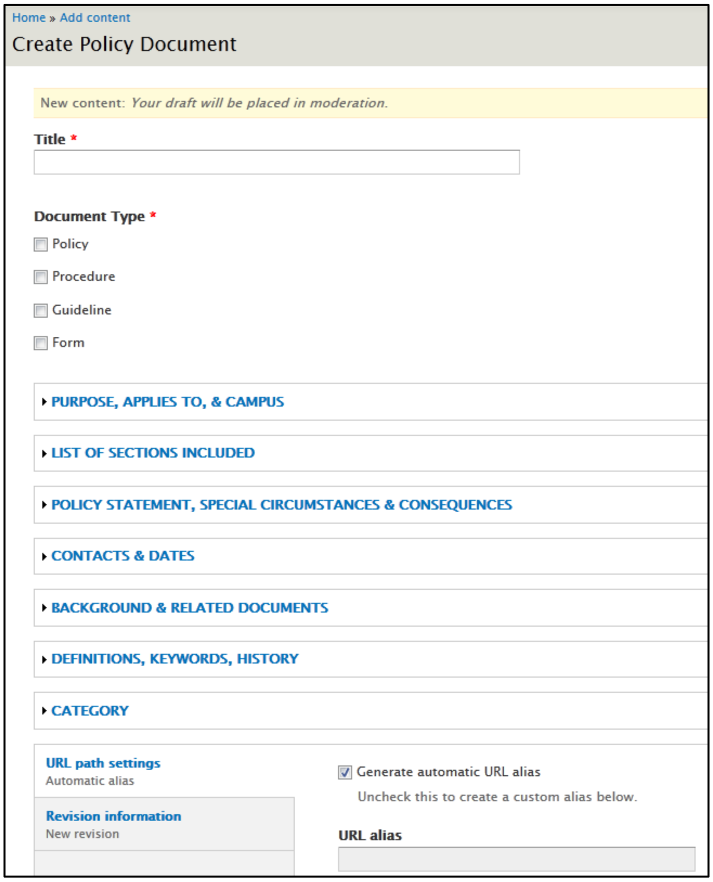


TITLE	POLICY OWNER	TYPE	AUTHOR	LAST UPDATED	ACTIONS
KU Core Curriculum	Office of Provost and Executive Vice Chancellor	Policy Document	Jessie Blakeborough	*1 week 4 days* ago	edit
Consulting Request Form for Faculty and Unclassified Academic Staff, Previous Year	Office of Provost and Executive Vice Chancellor	Policy Document – PDF/DOC/Link	Jessie Blakeborough	*2 weeks 1 day* ago	edit
Consulting Request Form for Faculty and Unclassified Academic Staff, Current Year	Office of Provost and Executive Vice Chancellor	Policy Document – PDF/DOC/Link	Jessie Blakeborough	*2 weeks 6 days* ago	edit
Consulting Request Form for Unclassified Professional Staff, Previous Year	Office of Provost and Executive Vice Chancellor	Policy Document – PDF/DOC/Link	Jessie Blakeborough	*2 weeks 6 days* ago	edit
Consulting Request Form for Unclassified Professional Staff, Current Year	Office of Provost and Executive Vice Chancellor	Policy Document – PDF/DOC/Link	Jessie Blakeborough	*2 weeks 6 days* ago	edit
Public Assembly Areas, Policy on	Office of Provost and Executive Vice Chancellor	Policy Document	Jessie Blakeborough	*2 weeks 6 days* ago	edit
Phased Retirement Application Form, Unclassified Academic and Professional Staff, MS Word	Office of Provost and Executive Vice Chancellor	Policy Document – PDF/DOC/Link	Kathy Dubois Reed	*3 weeks 5 days* ago	edit

Add New Policies

Click **Add New Policy page** on the administration bar:

That will take you to the **Create Policy Document** page:



Certain information is required for all policies; these fields are noted with a red asterisk *.

Each blue label is a general topic area; clicking on a topic area will expand it to show all fields grouped under it. Below is a list of the topic areas, which fields they include, and which of those fields are required:

- Title*
- Document Type*
- Purpose, Applies to & Campus
  - Purpose*
  - Applies To*
  - Campus*
- Policy Statement, Exclusions or Special Circumstances & Consequences
  - Table of Contents
  - Policy Statement*
  - Exclusions or Special Circumstances
  - Consequences
- Policy Owner, Contact, Approval, Dates & Review Cycle
  - Policy Owner*
  - Contact* (*Office's contact info; if listing specific people as contacts is necessary, use titles instead of names)*
  - Approved by*(*Title of the official with final approval, not an individual's name)*
  - Date (Approved on)* (*Original approval date)*
  - Date (Effective on)* (*Original enactment date)*

- Review Cycle*
- Date Last Reviewed (*The date of the last substantive review of content; if the policy was only edited to fix a typo or similar technical issue, that is not considered a substantive review)*

- **Background & Related Documents**
  - Background
  - Related Policies
  - Related Procedures
  - Related Forms
  - Related Other
- **Definitions, Keywords & Change History**
  - Definitions
  - Keywords*
  - Change History*
- **Category** (list of categories and sub-categories available on **Categories** handout)

Upload policy-related PDF/Word document/Excel sheet

Sometimes documents are related to a policy, but which don't match up with the policy page template very well; this might include procedural documents, forms, etc. For situations like this, instead of creating a new policy page, you would choose the **Add New Policy PDF/DOC/Link** option.

The fields available for this page are:

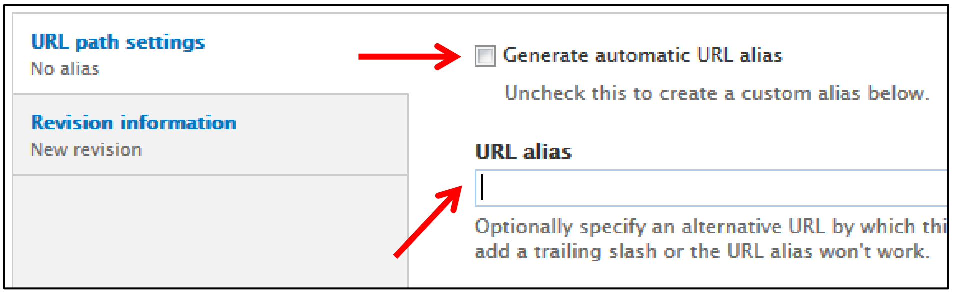
- Title*
- Document Type*
- Purpose*
- Applies to*
- Campus*
- Document (upload) - *PDF/Word: **Browse**→select **FileName**→**Upload**;*
  - *To add a new version of an already uploaded document, click **Remove** (this will automatically appear once a document is uploaded). After removing the original, follow the process above to add the new version. The old version of the document will still be accessible via previous versions of the page, located on the **Moderate** tab.*
- Policy Owner*
- Contact*
- Approved by*
- Date (Approved on)*
- Date (Effective on)*
- Review Cycle*
- Related Policies
- Related Procedures
- Related Forms
- Related Other
- Keywords*(*Especially important for keywords to be representative of the content for these pages; on policy pages, Search scans content as well as keywords, but there isn't content on PDF page)*
- Change History*
- Category

Additional Policy Information

In addition to the primary fields for policy content/information, there are two tabs at the bottom of the page for administrative settings for your policy - **URL path settings** and **Revision information**.

URL path settings:

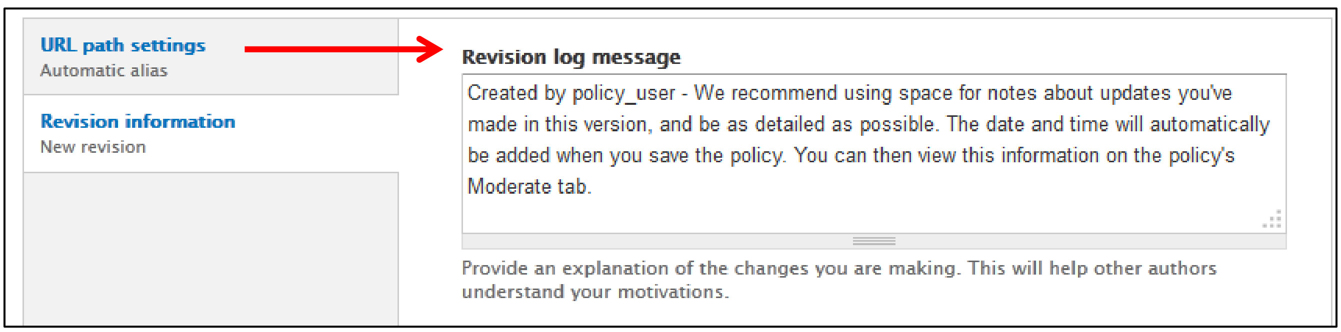
To set a unique URL for your policy, uncheck the **Generate automatic URL alias** box, and add your own URL.



The ***policy.ku.edu/*** will already be automatically included, so you can just add ***policy-owner/policy-name***. You will always use the same word or phrase for your office name.

Revision information – Revision log message:

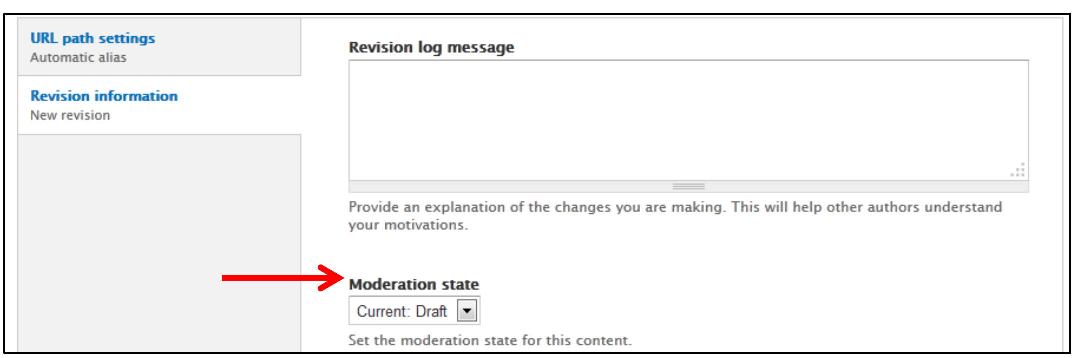
The **Revision log message** box provides a place for you to detail any updates/changes you've made to the policy.



This is helpful for identifying when specific changes were made, and for enabling Policy Office staff or other policy contributors from your office to quickly review updates. It will already have your username, and it will add date and time when you save the page.

Revision information – Moderation State:

Underneath **Revision log message** is **Moderation State**; this is where you save your policy as **Draft** or **Needs Review**.



Saving a policy as **Needs Review** will notify Policy Library moderators that it is ready to be published. Saving a policy as **Draft** keeps it accessible only by the creator/editor. If you need to make additional edits or updates before publishing, you should save it as a **Draft**; if you are finished editing and ready to publish the policy, save it as **Needs Review**.

Edit Existing Policies

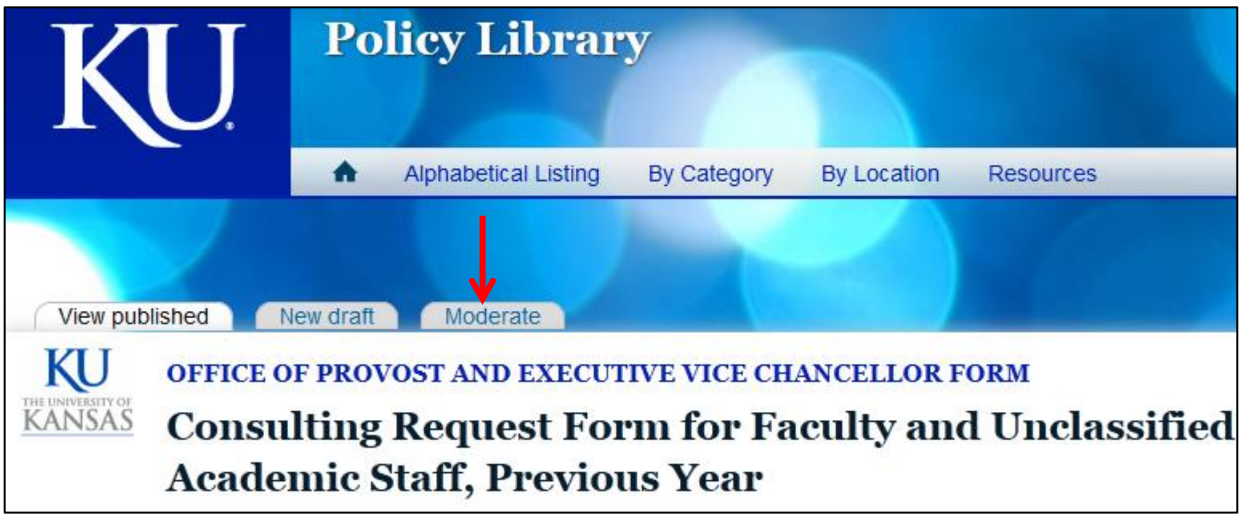
In addition to creating new policies, you can edit your office's existing policies, using the following methods:

- **My Workbench** → **All Unit Policies** → **Edit** (under **Actions**, the last column on the right)
- **My Workbench** → **All Unit Policies** → Click on hyperlinked **Policy Title** → **New Draft**/**Edit Draft** tab on the policy page
- policy.ku.edu → **By Location** → **By Office** → Your **Office** → **Policy Title** → **New Draft**/**Edit Draft** tab on policy page

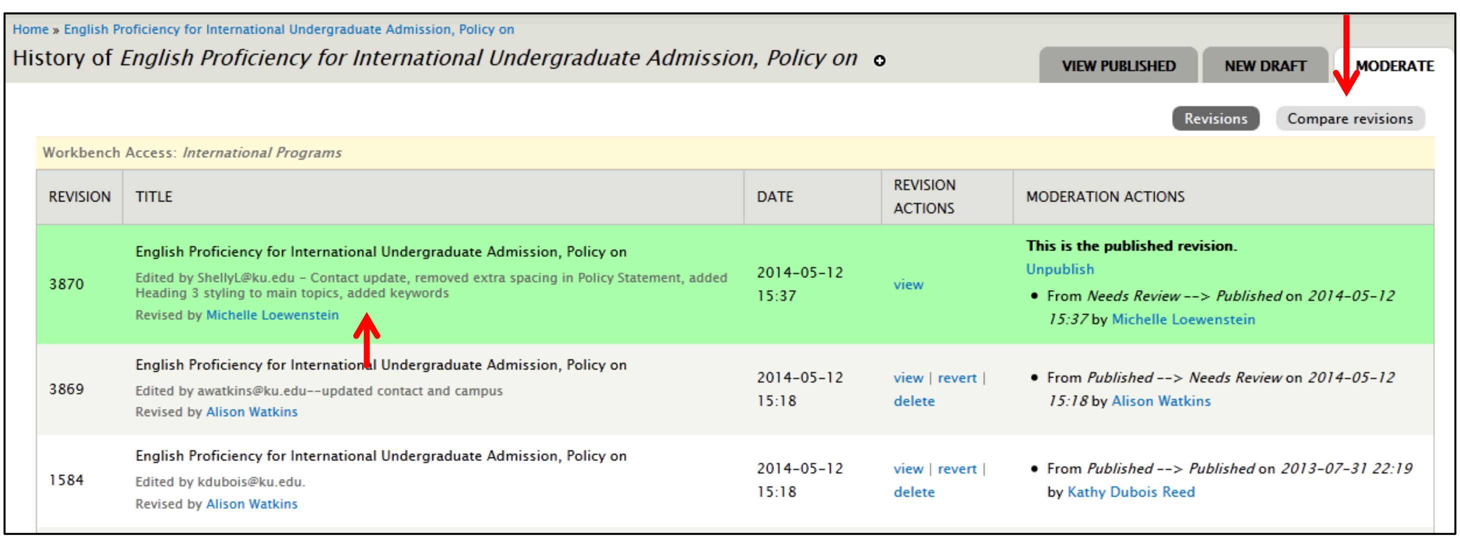
Once you are in the **New Draft/Edit Draft** page, it will work exactly the same as when you were adding new policies.

View Policy History

Once the updates are saved, that (and all) version(s) can be reviewed under **Moderate**, the last tab on the policy's page.



Clicking on **Moderate** will take you to a page with the full history of the policy since being added to Drupal. The second column will show the title of the policy, the information entered in the **Revision log message**, and the editor's username for each version. It also shows the date and time the revision was made, and available actions for each version – ***view*, *revert*, or *delete*** – and the last column shows which version is the currently published one.


Home » English Proficiency for International Undergraduate Admission, Policy on

History of *English Proficiency for International Undergraduate Admission, Policy on*

VIEW PUBLISHED | NEW DRAFT | MODERATE

Revisions | Compare revisions

Workbench Access: *International Programs*

REVISION	TITLE	DATE	REVISION ACTIONS	MODERATION ACTIONS
3870	English Proficiency for International Undergraduate Admission, Policy on Edited by ShellyL@ku.edu – Contact update, removed extra spacing in Policy Statement, added Heading 3 styling to main topics, added keywords Revised by Michelle Loewenstein	2014-05-12 15:37	view	**This is the published revision.** Unpublish • From *Needs Review* --> *Published* on *2014-05-12 15:37* by Michelle Loewenstein
3869	English Proficiency for International Undergraduate Admission, Policy on Edited by awatkins@ku.edu--updated contact and campus Revised by Alison Watkins	2014-05-12 15:18	view | revert | delete	• From *Published* --> *Needs Review* on *2014-05-12 15:18* by Alison Watkins
1584	English Proficiency for International Undergraduate Admission, Policy on Edited by kdubois@ku.edu. Revised by Alison Watkins	2014-05-12 15:18	view | revert | delete	• From *Published* --> *Published* on *2013-07-31 22:19* by Kathy Dubois Reed

There is also the **Compare revisions** button at the top right, which enables you to view the revisions and compare them to any previous draft.

Working with Links

We recommend hyperlinking the titles of policies, pages, etc., rather than displaying the full URL.

When linking to another Policy Library page, leave **Link Type** as *Internal Path*, and start typing the policy name you want to link to. It will start generating possibilities; select the correct one, click **OK**. This saves the time of finding the URL yourself.

Pasting Content

If your content is in a Microsoft Word document and you paste using ***Right Click → Paste***, or by using the ***Ctrl + v*** key combination, it may not be formatted correctly. Word transfers extra formatting information into Drupal's HTML code, which can add extra spacing, create line breaks mid-sentence, change font size/styling, etc.

Instead, use **Paste from Word**, which keeps the visible formatting and removes the extra HTML that disrupts the display.