How to Create a New Policy

To begin, start from the Home tab. Along the right-hand side, under the Policy Management header, click the New Policy button.

If your site has created any policy templates, select one from the list that appears.

Give the policy a title.

Click the Properties tab.

The person who creates the policy will be automatically assigned as the Owner. The Owner can be changed by typing a new name in the field and selecting a user from the list.

Use the dropdown to select an Area to which this policy will belong. Use the Approval Workflow dropdown to select the workflow that will be used to review this policy.

The Review Period is generated automatically based on the assigned Area. Type a new number in the Review Period box if you wish to select a different number of days before this policy needs to be reviewed.

If you site is part of a system, click the Applicability tab. Use the Applicability dropdown menu to select the desired Applicability group.

With these settings in place, the draft can now be saved.

Click the Content tab to return to the Editor and use it to create your policy content.

If you need to stop working but are not ready to start the Approval process, ensure you draft is saved using the auto-save feature or by clicking the Save button at the bottom before leaving this page.

If your policy is finished, click the Start Approval Process button below the policy content to send it through the Approval Workflow. The policy will become Active upon completing the workflow.