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DOCUMENTATION NAVIGATION

Also see:

- [New User Instructions - Policy Editors](#)
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Question 1

What is a structure of the Policy space?

Policy Confluence space is built around the original policy structure with added navigation and search features.

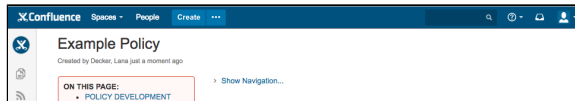
Navigation for the Policy page, Section its in, and the entire Policy Catalog is located on top of each page and collapsed by default.

You can expand navigation pages by clicking [Show Navigation...](#)

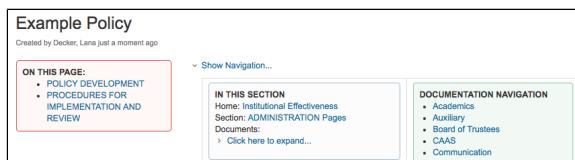
Admin and KB pages have slightly different layout, but all pages in IE space have 3 navigation sections:

1. On this page
2. In this Section
3. Documentation Navigation

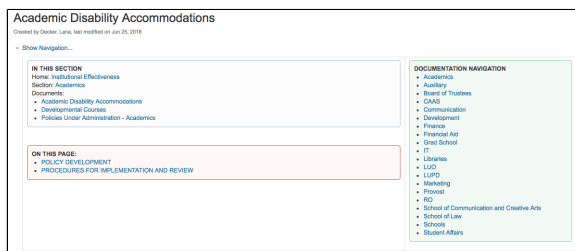
Collapsed Example:



Expanded Admin Example:



Expanded Policy Example:



Question 2

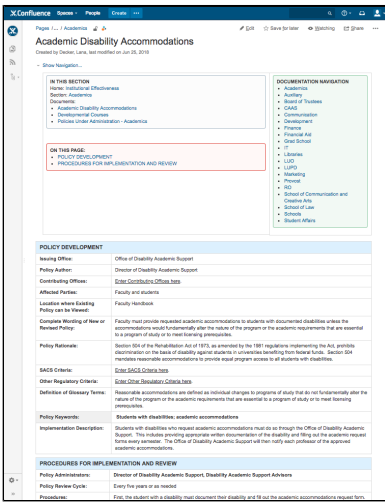
What is a structure of a Policy page?

Page Navigation:

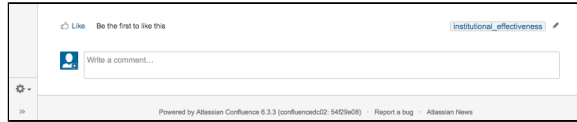


Default Confluence Options:

- Blue **Confluence Bar** is used to navigate between spaces, search, and create new pages within a space.
- **Pages / ... / Section_Name** navigation links show you shortcuts to home page (all pages), Parent page, as well as provide you options to? Edit, Favorite, Share and Action Menu access
- **Collapsible Sidebar** (gray vertical bar in picture on the left) can be shown by dragging border of the bar to the right (show more) or left (show less / collapse)



Additional features at the bottom of the page:



- **Like** feature allows you to "like" the page (and get notifications when its being updated)
- **Label** feature is used to search of content (similar to key words)
- **Comment** feature can be used to @ mention someone. (they will get the email with your comment)

Custom IE options:?

- **Show Navigation...** add another layer of "at your fingertips" content display / navigation. It has
 - On this page (red)
 - In this Section (blue)
 - whole Documentation tree view sections (green)

Page Body

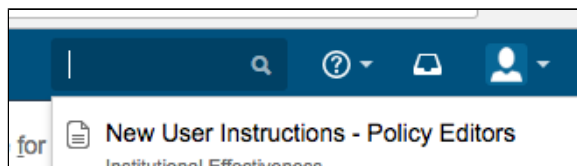
Policy consists of 2 viewable sections:

- Policy Development and
- Procedures for implementation and review

Question 3
How do I search for a Policy?

Search by Page Name

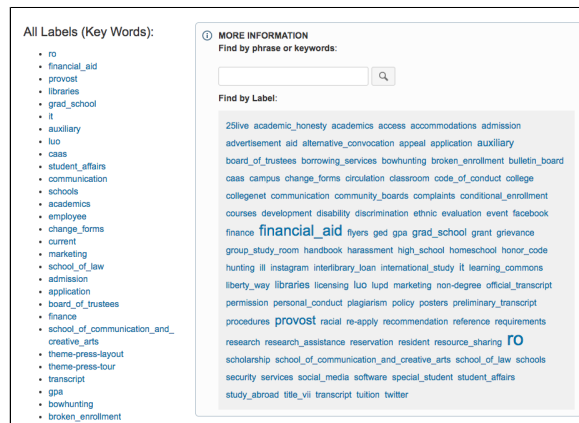
- If you know the name of the page you are looking for, you can use Search feature at the top of the page:



- By default, you will see list of recently viewed pages as well as link to see More recently viewed pages.
- If Confluence search returns no matches in full, it will search for partial matches in the name of the page, then label, then content of each individual page.

Search by Label

Confluence offers search by label option located on [Institutional Effectiveness Documentation](#) page:



- Note that only most popular, not all, labels are shown in each list.?
- You can use Search bar to find a less popular Label

Read [Atlassian Documentation](#) on how to use more advanced search options.

Question 4

How do I save / print a copy of a Policy?

Detailed? step by step instructions on Printing a copy of the Policy can be found on? [Printing instructions](#) page.

- For better result, please make sure to export your policy page in PDF format before printing a physical copy of it or sending it over as an attachment.?

Question 5

How do I create an editable copy of a Policy?

Unless you are working with a department that is responsible for creating policies, we recommend that you do not use only PDF format when exporting page for printing to ensure policy integrity. If you notice a typo or you feel like some other type of correction should be made, please contact one of the Policy Administrator, if specified, or a Confluence administrator (if unknown)

Question 6

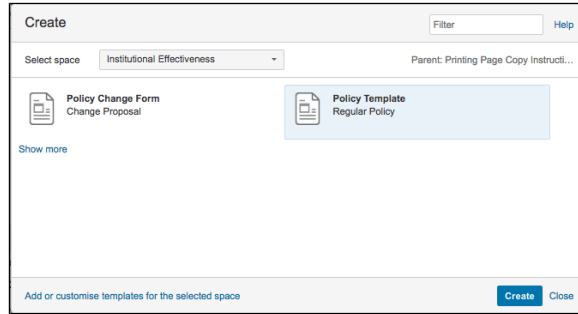
How do I create a new Policy?

You can create a new Policy page in 4+ steps:

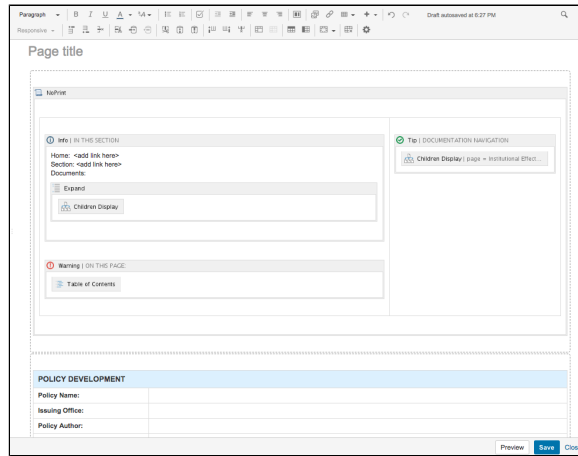
1. Click? **CREATE** ?button on a Confluence bar select Policy Template
2. Fill in Policy Template Metadata set
3. Enter Policy content following template selected
4. Click Save
+ add Labels to your Policy

1 Create Page from Template

If you have sufficient permissions, you can use Create button in blue Confluence Bar,?
Select Policy template like so:

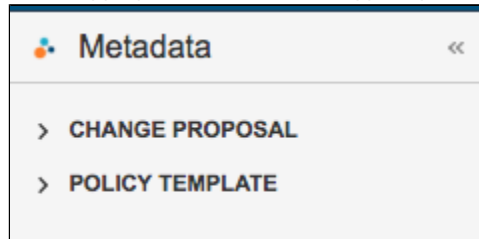


After that, just fill the template sections:



2. Fill In Metadata fields:

Select Appropriate Metadata set (typically, Policy template set)??



Confluence Spaces - People

Metadata <<

> CHANGE PROPOSAL

▼ POLICY TEMPLATE

Policy Name

Policy ID / Final Policy Number

Policy applies To

Policy Development Status

- Draft
- Pending Review
- Approved
- Published
- Change Request
- Retired
- Obsolete

Action Being Taken

Issuing Office (text)

Policy Author

Implementation Date

+ Configure Sets <<

?and fill in Labels:?

Page properties (id = PolicyTemplate) nodes = true

Here

Don't forget to add Labels to this page!

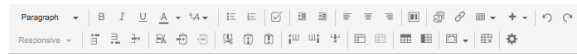
Preview Save Close

3. Save

Question 7

**How do I edit a Policy?
What editing/ formatting
options do I have?**

Editing bar in Confluence looks like this:



- you can read button names/ explanations when you move cursor over them
- some feature become available only in Table editing mode.

More information on using confluence formatting is available on [Atlassian Wiki?](#)

Question 8

**How do I request changes
to a Policy? How do I
submit a typo / error
report?**

good question!!! - need an answer

Question 9

**I cant find a Policy Im
looking for, why? How do I
fix it?**

1. If you cant find a Policy, please make sure the name of the policy or the name of the page where policy is located is correct - and you have permissions to access it.
2. If you unable to view the policy that exists, please check with Policy Administrator to make sure you have permissions to view it and with your Confluence administrator to verify that your permissions were set correctly.

Question 10

**I found a policy, but I cant
see it, why? How do I fix
it?**

If you unable to view the policy that you can see listed in Documentation tree, this is most likely due to mismatched permissions configured for your user.

Please check with Policy Administrator to make sure you have permissions to view it and with your Confluence administrator to verify that your permissions were set correctly.