Policy Services

PolicyBridge Training Manual
Introduction

The Arizona School Boards Association is a private, non-profit, non-partisan organization that promotes locally elected governance of public education and continuous improvement of student success by providing training, leadership and essential services to public school governing boards statewide.

For an additional fee, the governing boards of ASBA member districts gain access to model school district policy that is continually updated to ensure that it complies with state and federal law and opinions issued by courts and legal officers. In addition, Policy Services subscribers also have access to an expert staff comprised of experienced attorneys and former school administrators who are able to assist member boards with policy adoption, updates to policy and, when necessary, tailoring model policy to best serve the students and staff of the district and meet the specific requirements of local districts and boards. ASBA also provides free public access to the policy manuals of participating Arizona school districts.

ASBA's PolicyBridge software is included in the current suite of services provided by the Policy Services department. The software is designed to expedite the process of delivering Policy Services to member districts, by using a web-based platform that is accessible 24 hours a day, 365 days a year. This manual will train you on how to make content edits to your policy manual, coordinate with fellow district staff on updating the manual, adopting ASBA Policy Advisories, and what steps to take during a Policy Review.

To access the PolicyBridge website, visit www.azsba.org, hover your mouse over Policy, then select PolicyBridge from the drop-down menu:
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ASBA
Arizona School Boards Association
1.0 PolicyBridge Main Page

This is the page first shown when you navigate to the PolicyBridge site.

The page is divided into three main sections or frames as shown below.

At the top is the Navigation Bar.

On the left side is the Documents frame. This is also referred to as Table of Contents or TOC.

The main part of the window is taken up by a tabbed frame displaying the active Document and Advanced Search tabs. When the user is logged in with valid credentials, this is also where the Dashboard tab is shown.
# 1.1 Navigation Bar

A lot of the system’s functionality can be accessed from and ties into the Navigation Bar.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; Prev Doc</td>
<td>When viewing a document, clicking &quot;&lt; Prev Doc&quot; will open the previous document in the collection. If the first document in the collection has been reached, the last document in the previous collection will be displayed.</td>
</tr>
<tr>
<td>Next Doc &gt;</td>
<td>When viewing a document, clicking &quot;Next Doc &gt;&quot; will open the next document in the collection. If the last document in the collection has been reached, the first document in the next collection will be displayed.</td>
</tr>
<tr>
<td>&lt; Prev Hit</td>
<td>Jump to the previous hit in a document. If the first hit in a document has been reached, jump to the last hit in the previous document with hits. NOTE: This function is only meaningful if a search has been performed that produced one or more search results.</td>
</tr>
<tr>
<td>Next Hit &gt;</td>
<td>Jump to the next hit in a document. If the last hit in a document has been reached, jump to the first hit in the next document with hits. NOTE: This function is only meaningful if a search has been performed that produced one or more search results.</td>
</tr>
<tr>
<td>&lt; Prev Hit Doc</td>
<td>Jump to the first hit in the previous document with hits. NOTE: This function is only meaningful if a search has been performed that produced one or more search results.</td>
</tr>
<tr>
<td>Next hit Doc &gt;</td>
<td>Jump to the first hit in the next document with hits. NOTE: This function is only meaningful if a search has been performed that produced one or more search results.</td>
</tr>
</tbody>
</table>

**Document Location**

Starting at the root of the collection and expanding all the sections in the TOC, shows the full path in the collection where the current document is located. NOTE: this function is useful if the current document
was not browsed to, but arrived at by following a cross reference or search result link, where the TOC was not expanded.

<table>
<thead>
<tr>
<th>Support Documents</th>
<th>Folder system where supporting documents (like PDFs, Excel Spreadsheets, images, etc.) can be found when the user is logged in.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print</td>
<td>To print, select the document(s) you want to print on the Documents frame (the list of folders on the left) and select the Print button at the top left of the page. You may need to allow pop-ups from this page.</td>
</tr>
<tr>
<td>Help</td>
<td>Link to user’s manual.</td>
</tr>
<tr>
<td>Home</td>
<td>Link to jump to the PolicyBridge home page. Similar to browsing to PolicyBridge from scratch.</td>
</tr>
<tr>
<td>Login</td>
<td>Click to bring up a login prompt. Used for users with credentials (username and password) to the system.</td>
</tr>
<tr>
<td>Logout</td>
<td>Click to logout when finished working. This is only visible when the user is logged in.</td>
</tr>
<tr>
<td>Search field</td>
<td>Enter one or more words to search for and hit enter or click on the right arrow (-&gt;). If the search produces any search results, a new tab will open in the main frame, displaying the search results. Also see the description for how to do an advanced search on p. 6.</td>
</tr>
</tbody>
</table>
1.2 Documents (Table of Contents)

This is the list of collections and documents available to the user.

Browse the collections and the documents within, by clicking the arrow to the left of the titles to expand or collapse the section. If the document has subdocuments, it is displayed as a folder. If the document does not have subdocuments, it is displayed as a document and does not have an arrow to the left of it.
1.3 Document Tab

When the title of a document is clicked in the Documents frame (also called the Table of Contents or TOC), this tab in the main frame is opened and the contents of the document displayed to the user.

The user can also be shown the Document Tab if they follow a link (cross reference or search result) from elsewhere in the system that references a document.
1.4 Advanced Search Tab

Here you can do a basic search or utilize the Proximity and Boolean search.

When you enter a word or phrase, if nothing in the Documents frame (the list of folders on the left) is checked, the search will expand to all districts. This means that the search will be run for all documents listed in the TOC, which may be a very long process. If you only want to search one or two districts, or a specific document, simply select it in the Documents frame before performing the search. You can also select the county, scope, district size, or district type you would like to search on the scroll bars to the right.
The Proximity search allows you to search two words and it will find each document that contains both words within 15 words. It will also highlight all words associated with your search in the document.

The Boolean search allows you to do a relational search using the terms: and, or, and not.

- **And** combines search terms so that each search result contains all the terms. For example, CAT and MOUSE finds documents that contain both CAT and MOUSE.

- **Or** combines search terms so that the search result contains at least one of the terms. For example, MILK or JUICE finds documents that contain either MILK or JUICE.

- **Not** excludes terms so that each search result does not contain any of the terms that follow it. For example, PARENTS not STUDENTS finds documents that contain PARENTS but not STUDENTS.

Choose to save your search for future reference.
1.5 Dashboard Tab (when logged in)

This will be the first screen you see when you are logged in as a user. To log into PolicyBridge from the Main Page, enter your username (your district e-mail address) and your password (your password is provided to you by ASBA or a District Super User).

When logged into your profile, you can expand and select the Documents frame (the list of folders on the left). You can view the Dashboard, Document, and Advanced Search tabs. Within the Dashboard tab, you can view My Work and Functions.

*At any time while on the site, you can go back to the Dashboard by selecting the Dashboard tab near the top left.
2.0 Dashboard

2.1 My Work

2.1.1 Policies Requiring My Attention (My Docs)

Here you will find a list of documents that you are either working on or documents that have been submitted by ASBA for your review. You can click on the box under Note to read a note that is attached to the document. Click on the document title to bring up the document for additional editing, or to view the status of a document. For instructions on how to edit a document, see **Edit a Document** on p. 29.
2.1.2 Policy Advisories awaiting adoption

Here you will find new versions of documents that were submitted by ASBA for recommended updates.

This is an important report/screen with a lot of information. It contains functionality that will help you decide if you want to adopt or decline the PA version or add it to the district manual as a draft version for further editing before adopting.

If there are many documents awaiting your adoption, you may have to scroll the page down to see them all or to reach the submit button at the end. Hover the mouse over the buttons in the columns for hints to what the button does.

The user can expand or narrow columns to better read the contents. This is done by placing the mouse between two column titles. Hover the mouse until two arrows appear, then click and hold down the mouse button. Slide left or right to expand or narrow the columns, and release the mouse button to set. The settings do not carryover if the user closes the tab.

**Column meaning/function**

<table>
<thead>
<tr>
<th>Header</th>
<th>Meaning/function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy</td>
<td>The title of the document in the District Manual. If the PA pushed out a document not already in the District Manual, this column shows <strong>Document missing</strong></td>
</tr>
<tr>
<td>Master Policy</td>
<td>The title of the document in the Master Manual maintained by ASBA.</td>
</tr>
<tr>
<td>Action</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
</tr>
<tr>
<td><strong>PA</strong></td>
<td>Click the &quot;PA&quot; button to see the Policy Advisory message sent out by ASBA.</td>
</tr>
</tbody>
</table>
| **Add PA version Draft to Manual** | Click the "Add PA version Draft to Manual" button to add the new PA version as a draft version in the District Manual. The draft version can then be edited as any other draft before it is submitted to ASBA for publication.  

**NOTE:** Once you have added the version to the District Manual as a draft, the document will no longer show on the "Policy Advisories awaiting adoption" screen. Instead, you can find it on the "Policies Requiring My Attention (My Docs)" screen.  

See the description starting on p. 13 for more details on this process. |
| **Add New Doc to TOC** | If the PA created a new document, you must select where in the District Manual to insert the new document. Click the "Add New Doc to TOC" button to select where in the District Manual hierarchy the new document should be placed.  

See the description starting on p. 17 for more details on this process. |
| **Compare this PA to previous PA version** | Use the "Compare this PA to previous PA version" button to open the compare tab, showing the difference between this latest PA document version and the previous PA document version ASBA pushed out.  

**NOTE:**  
Red signifies text that was removed in the later version.  
Blue signifies text that was added in the later version.  
Black signifies text that is similar in the two versions. |
| **Compare PA version to Manual version** | Use the "Compare this PA to Manual version" button to open the compare tab, showing the difference between this latest PA document version and the current public District Manual document version.  

**NOTE:**  
Red signifies text that was removed in the later version.  
Blue signifies text that was added in the later version.  
Black signifies text that is similar in the two versions. |
| Adopt                  | Check the "Adopt" checkbox if the new PA version should be adopted without further reviews or edits.  
|                       | **NOTE:** The checkbox is disabled if the new PA document version contains blanks that need to be filled out by the district before it is adopted/published. In this case, you must use the "Add PA version Draft to Manual" to create and edit a draft version before submitting to ASBA for publication. |
| Decline               | Check the "Decline" checkbox if the new PA version should be declined. |

**Add PA Version Draft to Manual**

As explained in the **Column meaning/function** chart above, clicking on the “Add PA version Draft to Manual” button will add the new PA version as a draft version in the District Manual so that it can be edited. The Super User will receive a message that a Draft was created.

To edit the document, it can now be found in “Policies Requiring My Attention (My Docs).” It will no longer appear on the “Policy Advisories awaiting adoption” screen.

If the District does not have the document already in its Manual, the phrase “**Document missing**” will show in the Policy column of “Policy Advisories awaiting adoption.” The document will have to be added by the Super User.

Select the section to which the document should be added, and click on the arrow to the left of that section.

In this example, document GCCG-RA will be placed in Section G (see graphic on p. 15).
Select the document (scroll down as needed) above or below which the document should be placed, and click on the arrow next to that document.

In this example, document GCCG-RA will be placed below document GCCG (see graphic on p. 16).

**NOTE:** Documents should be placed in alphabetical order, and regulations should be placed before exhibits.
Select “Insert Before This” or “Insert After This,” as applicable. In this example, GCCG-RA will be inserted after GCCG. Alternatively, it could be inserted before GCCH.

The popup screen “Draft successfully created” will appear.
To edit the document, it can now be found in “Policies Requiring My Attention (My Docs).” It will no longer appear in “Policy Advisories awaiting adoption.” It can also be accessed from the TOC. For instructions on editing, see Edit a Document on p. 29.

Add New Doc to TOC

As explained in the Column meaning/function chart on p. 12, if a Policy Advisory created a new document, and the District chooses to adopt it, you must select where in the District Manual to insert the new document. Click the "Add New Doc to TOC" button to select where in the District Manual hierarchy the new document should be placed. The instructions for doing this follow below; they are like those in Add PA Version Draft to Manual addressed on p. 13.

A new document is being added, so the phrase “**Document missing**” will show in the Policy column of “Policy Advisories awaiting adoption.”

In this example, we are looking at IHAMC.

<table>
<thead>
<tr>
<th><strong>Document missing</strong></th>
<th><strong>IHAMC © INSTRUCTION AND TRAINING IN CARDIOPULMONARY RESUSCITATION</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>UNIT USE OF TECHNOLOGY RESOURCES IN INSTRUCTION</strong></td>
<td><strong>GDFA © SUPPORT STAFF QUALIFICATIONS AND REQUIREMENTS</strong></td>
</tr>
</tbody>
</table>

To add the document, click the "Add New Doc to TOC" button, and the “Insert new Policy Advisory Document” popup screen will appear.
Select the section to which the document should be added, and click on the arrow to the left of that section.

In this example, document IHAMC will be placed in Section I.

Select the document (scroll down as needed) above or below which the document should be placed, and click on the arrow next to that document.

In this example, document IHAMC will be placed below document IHAMB-R (see graphic on p. 19).

**NOTE:** Documents should be placed in alphabetical order, and regulations should be placed before exhibits.
Select “Insert Before This” or “Insert After This,” as applicable.

In this example, IHAMC will be inserted after IHAMB-R. Note that the District already has a document IHAMC. This is an outdated policy and should be taken to the Board for removal. Its presence does not preclude placing the new document in the TOC.

The document will remain in “Policy Advisories awaiting adoption” to be addressed as appropriate. What is different is that under the Policy column, it now identifies where the document is to be placed in the TOC rather than showing the phrase “** Document missing **” (see graphic on p. 20).
The document can now be adopted as is, or it can be added as a draft to the Manual by selecting “Add PA version Draft to Manual.” If a draft is added to the Manual, the document can be found in “Policies Requiring My Attention (My Docs).” It can also be accessed from the TOC. For instructions on editing, see **Edit a Document** on p. 29.

**Submit button**

Click the "Submit" button if one or more "Adopt" and/or "Decline" checkboxes are checked and you wish to submit those documents for adoption or declination.

Remember, if there are many documents awaiting adoption, you may have to scroll the page down to reach the submit button at the end.

A window allows you to enter an as of date and a note to attach to the adoption/declination:

![Submit window](image)

Click "Submit" to adopt and/or decline the documents, or click "Cancel" to abort the process.
2.1.3 Work History (policies visited in the past)

Here you will see a list of all the documents that you have previously worked on and the date any edits were made. Clicking on the policy title will launch the document, so you can review it and/or make further edits.
2.1.4 Change Password

You need the current password to change an existing password. If you do not know your password, contact ASBA or the District Super User.
2.1.5 Logout

There are two options to log out. Select the tab under My Work (Dashboard Tab), or select LOGOUT from the Navigation Bar as described on p. 3.

*Please remember to always logout when stepping away from your computer.
2.2 Functions

Functions covers two tabs: Print TOC (selected titles) and User Management.
2.2.1 Print TOC (selected titles)

Select any number of documents and/or folders by checking their checkbox in the TOC, then click the "Print TOC (selected titles)" button.

The program will open a new browser window or tab and show the TOC items.

Right click the mouse while on this page and select print.

*Note: if you want a title printed, it must be expanded and shown with a marked checkbox in the TOC. Checking a checkbox of a section will not print the policies in that section unless the section is expanded.
2.2.2 User Management

Here you can create a new user. Be sure to add his/her first and last name, e-mail, password, start/end date, and role. Users may be classified as Restricted Readers or School district editors. A Restricted Reader can review documents that have not yet been published; a School District editor can review and make changes to those documents. Once saved, the new user will have immediate access as long as the start date is not set for a future date.

You also have the ability to deactivate a user. Note that once a user is deactivated, you will need to contact ASBA if you want to have the user reactivated.

*Note: when you are logged in, you will not see your own name listed under User Management.*
3.0 Collection Meta Data

3.1 Collection Meta Data Tab

Open the Collection Meta Data tab by right clicking on the collection (manual) title in the TOC and selecting "Collection Meta Data" from the context menu.

The Collection Meta Data tab shows useful information about the School District Manual, such as the assigned Policy Analyst at ASBA and the Manual's last full review date.

It is also from here you can print a full version of the manual as a PDF files (see Download/Print Full PDF on p. 28).
3.2 Download/Print Full PDF

From the Collection Meta Data tab (see Collection Meta Data Tab on p. 27 to learn how to access this tab), click on the "Download/Print Full PDF" link.

If a PDF file already exists for the District Manual, you will be prompted to open the existing PDF or generate a new one.

If no PDF exists, the PDF file is generated on the server. This can be a long running process. You will receive an email notifying you when the PDF is ready, at which point you can come back to the Collection Meta Data tab and click the "Download/Print Full PDF" link again.

When you choose to display the PDF, it will open in a new browser window/tab if your browser is capable of displaying PDF files. Otherwise it will be downloaded to your device.
4.0 Editing Documents

4.1 Edit a Document

When logged in as a Super User, use the TOC to browse to the document you want to edit. Then right click on the document. A context sensitive menu appears, from which you can choose "Edit Selected Document".

A new tab opens in the main frame with the document loaded in the editor.

When you click Edit Selected Document, the document will appear in a new tab. This will create a Draft document. A Draft document clones the
public document, but will allow you to make changes, without the public seeing those changes (until it is submitted to and approved by ASBA). The Draft Document will appear in My Docs on the Dashboard for you to revisit once it is saved.

**You must save the document by clicking on “Save and Process Document” and making the appropriate selection on the popup screen before any changes will be saved to the database.**

Scroll to the bottom of the editing page to ensure you see the “Save and Process Document” option. See p. 35 for further explanation of this function and the options available to you.

You will also find the Document Meta Data that is associated with the document you are editing when you scroll to the bottom of the editing page. In the Doc Versions section, you can see the history of the document. This allows you to compare the Draft document to the Public document and view any corresponding Policy Advisories.

**Editing Details**

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Scissors" /></td>
<td>Highlight the word(s) you want to delete, and click this icon. This will delete the selected text and store it for pasting purposes.</td>
</tr>
<tr>
<td><img src="image" alt="List" /></td>
<td>Highlight the desired text, and click this icon to insert or remove numbered lists.</td>
</tr>
<tr>
<td><img src="image" alt="Copy" /></td>
<td>Highlight the word(s) you want to copy, and click this icon.</td>
</tr>
<tr>
<td><img src="image" alt="List" /></td>
<td>Highlight the selected text, and click this icon to insert or remove bulleted lists.</td>
</tr>
<tr>
<td><img src="image" alt="Paste" /></td>
<td>(Plain Text) Click the cursor where you would like your copied text, and select this icon to paste it.</td>
</tr>
<tr>
<td><img src="image" alt="Indent" /></td>
<td>Highlight the selected text, and click this icon to decrease or remove the indent.</td>
</tr>
<tr>
<td>Icon</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td>←</td>
<td>Click this icon to undo or reverse the last action you performed.</td>
</tr>
<tr>
<td>→</td>
<td>Click this icon to redo the last undo action.</td>
</tr>
<tr>
<td>☑️</td>
<td>Choose to enable SCAYT, the function that allows you to spell check as you go and to look up the definition of words. Or, disable SCAYT and perform manual checks by choosing Check Spelling.</td>
</tr>
<tr>
<td>✋</td>
<td>Highlight the desired text, and click this icon to increase the indent when creating subpoints within lists.</td>
</tr>
<tr>
<td>✋</td>
<td>Highlight the word(s) you want to become a link, click this icon, insert the appropriate URL, and press OK.</td>
</tr>
<tr>
<td>Title</td>
<td>Highlight the word(s) you want to become an internal link, click this icon, choose the appropriate destination, and press OK.</td>
</tr>
<tr>
<td>Iₓ</td>
<td>Highlight the word(s) you want to unlink, and click this icon.</td>
</tr>
<tr>
<td></td>
<td>Highlight the word(s) you want to unselect, click this icon.</td>
</tr>
<tr>
<td></td>
<td>Highlight the word(s) you want to remove text format, and click this icon.</td>
</tr>
<tr>
<td></td>
<td>At any time, click this icon to expand the document to full screen. To return to a minimized screen, click this icon again.</td>
</tr>
</tbody>
</table>
4.2 Add a Document

When logged in as a Super User, use the TOC to browse to the location where you want to add the document. Then right click on the document above or below where you want the new document placed. A context sensitive menu appears, from which you can choose "Add Regulation" or "Add Exhibit".

Click on the document type you want to add. A prompt will ask if you want to add the new document above or below the one you right clicked on in the TOC.

Once you have chosen Above or Below, a new blank document is opened in the editor and placed in a tab in the main frame. The new document is initially titled "Add Regulation" or “Add Exhibit” + the title of the document you right clicked on in the TOC. Be sure to change the document’s title in the Document Meta Data section of the editor before saving. The name should simply be the alphabetical code of the policy with -R for regulation or -E for exhibit. In the example below, the correct title is BA-R. See the screenshots on p. 33.
Click on the “Save and Process Document” button and make the appropriate selection. See Submit Document for Review or Publishing on p. 35 for further explanation of this function and the options available to you.
4.3 Compare Document Versions

Open any document for editing and scroll down to the "Document Meta Data" section.

If there are multiple versions of the document, you can select two versions by checking their checkboxes. Then click the "Compare versions" button. A new tab will open, showing the differences between the two versions.

Red signifies text that was removed in the later version.

Blue signifies text that was added in the later version.

Black signifies text that is similar in the two versions.
4.4 Submit Document for Review or Publishing

When the "Save and Process Document" button is clicked, you will see the Save and Process Document popup screen. From here, you can save, submit for review, adopt, decline, approve, remove, or re-assign the document.
The popup can be used to save the document; this creates a draft version that you may continue to edit right away or that you may return to edit later.

If you choose to submit for review, adopt, decline, approve or remove the document, it will first be saved, then submitted. If adopt, decline, approve or remove is chosen, you must provide an as of date. If you do not provide an as of date, you will be prompted to do so.

*Note: in the case of a policy being adopted by the Board, please ensure the date that is submitted is the actual date the document was adopted by the Board.

*Note: when a policy is to be removed, please contact ASBA to confirm that this was a Board-approved decision and to ensure that all associated documents (e.g. regulations and exhibits) are also removed.

Choose re-assign if the document should be re-assigned to a School District Editor. The document will be sent to his or her Policies Requiring My Attention (My Docs). The Editor should edit the document as needed and then resubmit it to the Super User.

Enter a note if you wish to. This note will be sent along with the submission or reassignment to the receiving user.

Once you have chosen how to process the document, click "Submit". Click "Cancel" to abort the "Save and Process Document" process.