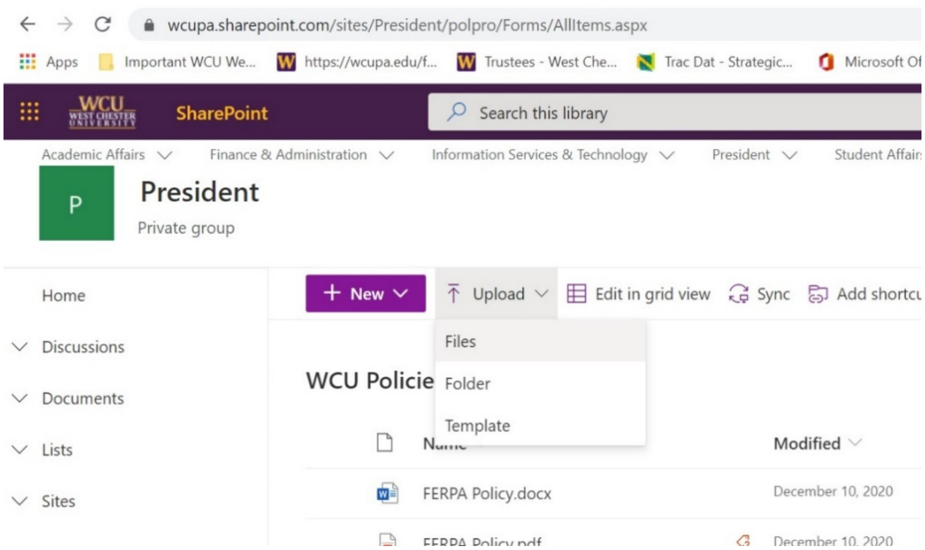
How to Initially Upload a Policy to the WCU Policy Library SharePoint

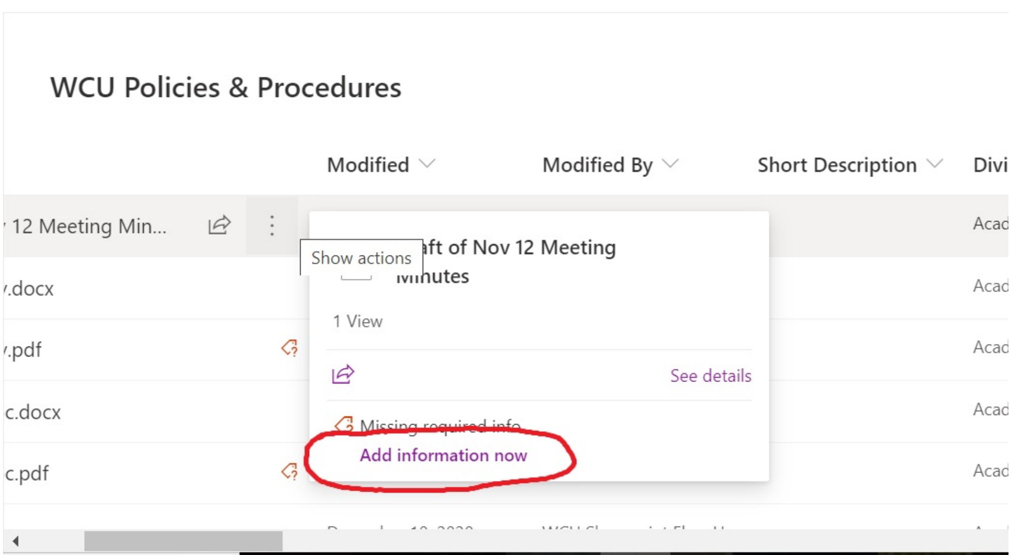
(not to be used for policies already in the policy library)

WCU Policy Library SharePoint: https://wcupa.sharepoint.com/sites/President/polpro/Forms/AllItems.aspx

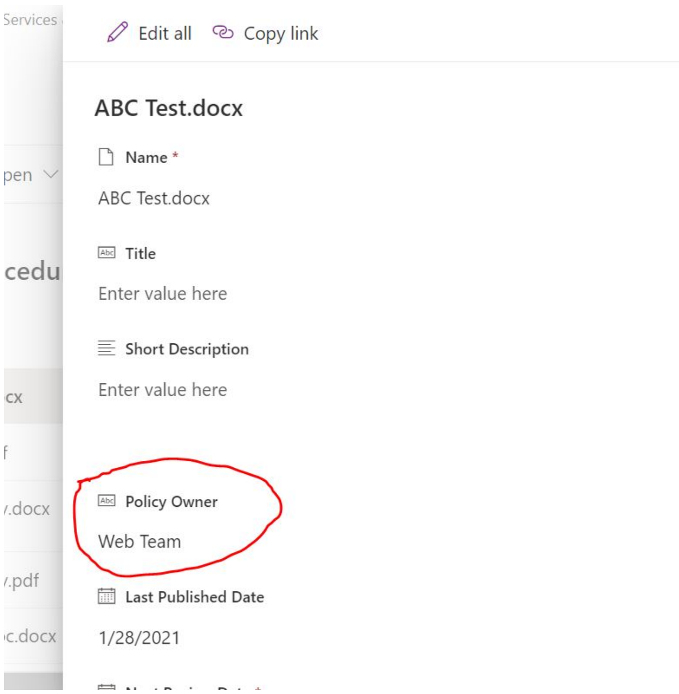
1. Click Upload → Files and select the WORD version of the policy you wish to upload **(YOU MUST UPLOAD THE VERSION SAVED TO YOUR HARD DRIVE ("THIS PC") – DO NOT UPLOAD FROM YOUR ONEDRIVE/TEAMS/OR OTHER DOCUMENT MANAGEMENT SYSTEM)**. Now the Policy will show in the Library.



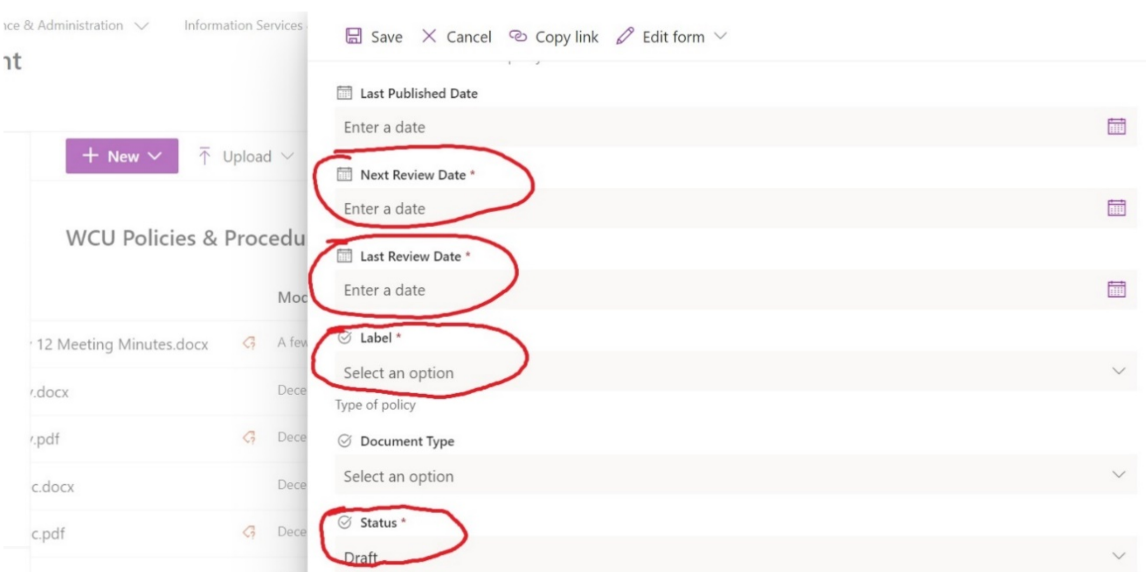
2. Find the newly uploaded policy in the list. Hover over the 3 dots → Click "Add information now" to complete the missing information.



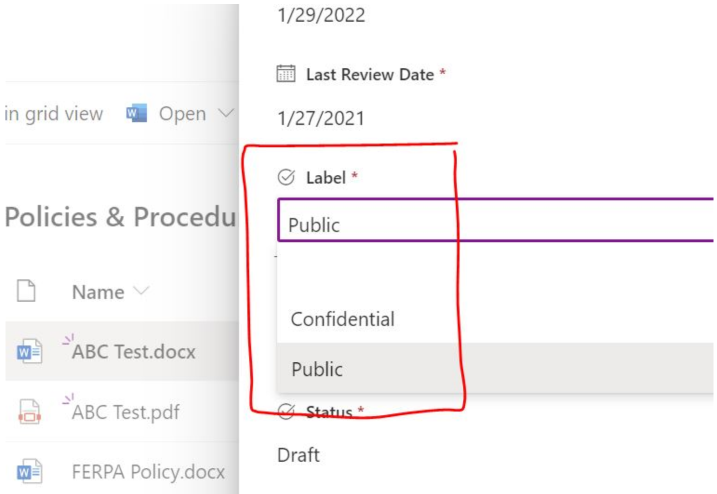
3. Fill in all required boxes with appropriate information as illustrated in the following images **(see checklist below step 5)**:



Policy Owner shall be the title (not the name) of the person responsible for the policy

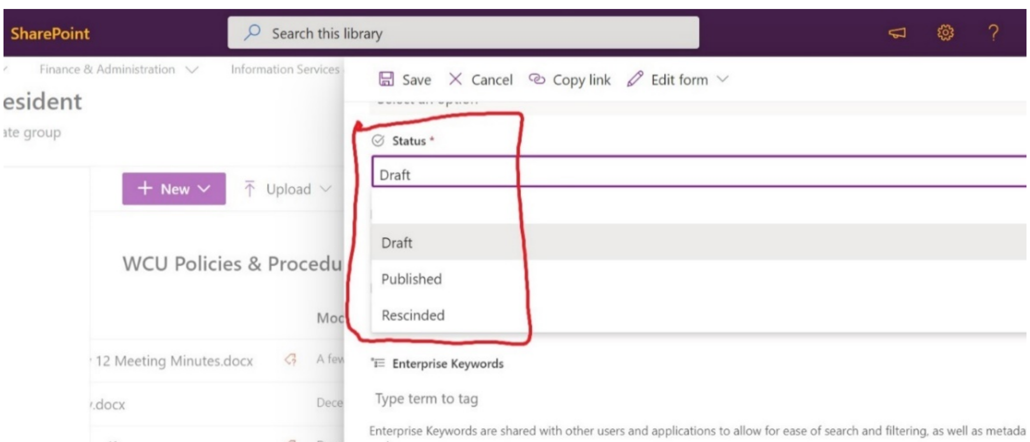


See next 2 images for details regarding **"Label" and **"Status"**

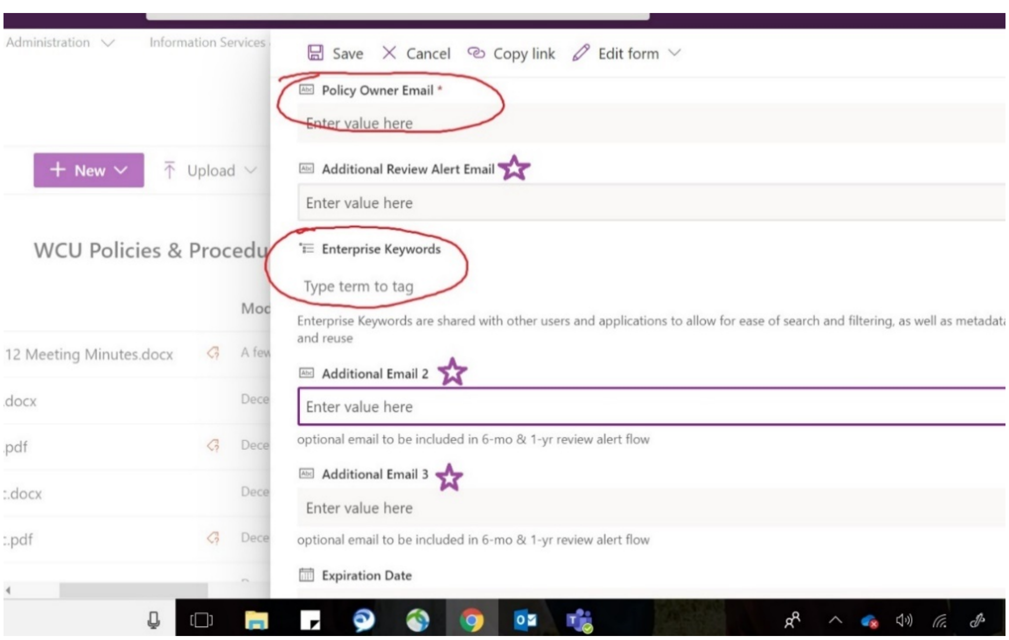


Label shall refer to the policy's appearance on the public facing website.

Select *Public* for all Policies that are to be published on the WCU website.



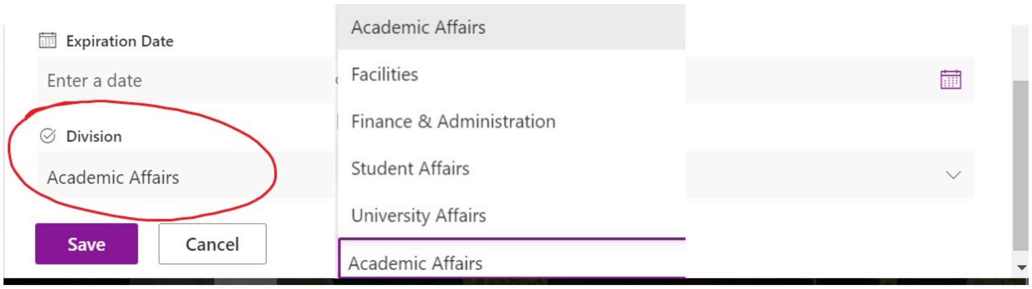
Change **Status** from *Draft* to *Published*.



Policy Owner Email shall correspond to the individual within that role (may be individual or generic email).

Additional Email's (up to 3) shall be managers and/or leadership within department/division

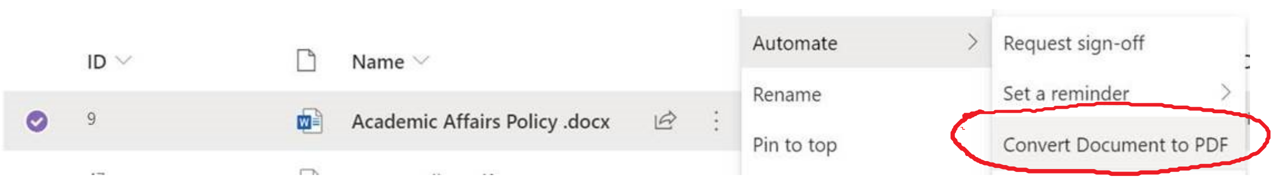
Enterprise Keywords – enter keywords (separated by comma) for public site filtering capability



Select appropriate **Division** from drop down menu

4. Click Save

5. Convert Document to PDF: **The very first time this step is completed, you will need to connect to the Microsoft Flow. See page 5 for these steps. Once you have done that, you will not ever have to do it again and will complete all future conversions as follows:** Locate the policy on the main list. Click the 3 dots to right of the document name → Mouse over to "Automate" → Click "Convert Document to PDF"



***Checklist of Required Information to Complete in Step 3**

☐ Policy Owner	☐ Policy Owner Email
☐ Next Review Date	☐ Additional Email Addresses
☐ Last Review Date	☐ Enterprise Keywords
☐ Label	☐ Division
☐ Status	

All other boxes can be filled in to provide additional detail as user sees fit.