USER INSTRUCTIONS

ON LINE POLICY SEARCH DRIVE

This Guide is designed to give new users three elements: an overview of the search browser, steps for performing key tasks, and additional information that can be useful in providing information to NMSBA Policy Services regarding policy changes.

The z2 browser is an HTML based search tool. Before you can effectively use information, you must be able to find it. This tool helps you to find critical information in a variety of ways. The most effective way is by performing a search. Since every word in the District policy manual is indexed, you can search for one word or a combination of words. You can use Boolean operators and other advanced searching techniques to quickly find instant answers.

A district can reach the on line manual by going to http://www.nmsba.org/policy-service/ then Go to Policy Portal. At the Portal, which has the NMSBA symbol on the top, select your district from the drop down menu. You will arrive at the z2 browser which has the NMSBA symbol on the top left along with several buttons across the top and two panels below that. The left panel contains the folders District and USC.

<u>Expanding the folders</u>
The folders include the District and USC. One way of accessing information is by using the table of contents of the District folder. There is no table of contents for the USC, it is simply federal codes linked to the policies. The Manual table of contents allows you to get a holistic view of the contents. You can expand or collapse the headings as necessary to see as much or as little of the contents as you wish. Once you see the policy or heading you want, just click to go to it.

Step 1 You may expand each section of the policy manual by placing your mouse pointer and clicking on the named section to the left side panel.

Step 2 By expanding the section you will find a list of the policies under that section.

Step 3 By expanding all the sections you will find a listing of all of the policies.
•By selecting a section you feel the policy you are seeking may be in, you can review all policy titles in that section. You can also review all titles of all policies by expanding all sections.

Using the word search capability

In the top panel there is a blank oval next to the red search button. This is the location in which words or phrases you wish to search for can be typed.

Step 1 Type the word or phrase you wish to find in the Manual and if more than one word put quotes (") around them to be specific.

Step 2 Once you have typed the word or phrase click ENTER on your keyboard or click on the search button.

Step 3 Next, look in the right lower panel for the results. The results will be listed by the Policy in which it is found. Most likely you will be looking for a policy so look at the hits that are listed by the named policy.

•Each hit can be selected by placing your mouse pointer on the words, code or title of the policy.

•To clear the search and search again, place your cursor over the x to the right in the brackets and click.

•To move around within the searched folder use the buttons such as prev hit doc and next hit doc etc..

Using the advanced search located below the buttons

You may also use the Advanced Search button in the middle right of your screen. It is similar to your usual browser

Step 1 Choose the "Advanced Search" button on line in the middle of the browser.

•A variety of search methods will be available.

Step 2 Choose a Search type.

•Type in your search information and using your keyboard click Enter.

•If you are not familiar with these search methods from use of web browsers then use the brackets in the top pane.

•Each hit can be selected by placing your mouse pointer on the words, code or title of the policy.

•To clear the search and search again, place your cursor over the x to the right in the brackets and click.

•To move around within the searched folder use the buttons such as prev hit doc and next hit doc etc..

Step 3 Searches may be saved

•While the browser is open the searches may be saved and reused.

Printing

The browser itself supports printing using the print button. It will print the highlighted or marked and bound material being shown in the right panel.

Word processing

Use a word processing program by placing the material into a word processing program.

Step 1 Mark and bound (highlight) the text to be transferred.

Step 2 Open a word processing program to a blank page.

Step 3 Copy the highlighted text in the browser using the edit > copy button or ctrl > C on the keyboard.

Step 4 Place your cursor in the word processing blank page..

Step 5 Copy the text into the word processing program using the edit > paste button or ctrl >V on the keyboard.

Step 6 Print or modify from the word processing program.

Additional Information

Making changes to policies to submit to Policy Services

Using the word processing directions will provide a word document that can be changed by striking through text to be omitted and underlining inserted text. The saved document can be sent by email with an adoption date to NMSBA policy services for processing once adopted by the Board. Please enclose the date of adoption with the modified policy.

Send all adopted policies to jfkpolicyservice@gmail.com to the attention of John Kennedy. Policy Services will format and title the document, sending a hard copy to the district for insertion in the hard copy manual. Policy Services will also place the text in the district's on line manual.