



District Setup Guide

For the administrator who imports policies, uploads handbooks, and manages your district's sources

Setup administrator edition · Version 1.0

Your Role in Twenty Minutes

One person in each district sets up the workspace that everyone else asks questions against. This guide walks you through that setup: creating the workspace, importing your board policies, uploading handbooks, and keeping sources healthy. Most districts complete the full setup in under twenty minutes.

Step 1: Create the District Workspace

- 1 **Go to policytoaction.beauhawked.com** and select **Create a workspace**. Enter your name, your district's official name, your work email, and a password, then verify your email from the message that arrives.

Naming matters: The district name you enter appears throughout the platform and in every user's answer header. Use the full official name, for example "West Lafayette Community School Corporation" rather than "WLCSC".

Step 2: Import Your Board Policies

Open the **Library** (book icon in the left rail) and select **Add source**. You have two paths for policies: importing directly from your district's policy website, or uploading a CSV file.

Add a source

Import from district website Upload CSV Upload handbook PDF

Platform: Auto-detect ☐ Include all books

Figure 1. The Add a source screen. Import from your policy site, or upload a CSV or handbook PDF.

Path A: Import from your district website

- 1 Paste your policy site URL** into the import field. BoardDocs, table-based policy pages, and accordion-with-PDF sites are supported. Leave the platform on **Auto-detect**; after scanning, the screen shows which platform was detected.
- 2 Select Scan.** The platform reads the site and builds a preview: how many policies it found, sample rows, and quality signals such as duplicate codes or missing wording. Review the samples to confirm the text looks right.
- 3 Commit the import.** If the preview looks correct, confirm it. The policies load into your workspace and are immediately searchable and citable. If something looks wrong, Discard and contact support before committing.

Path B: Upload a CSV

If you maintain policies in a spreadsheet, export it as CSV with columns for section, code, title, and policy wording, then use the **Upload CSV** tab. The upload preview shows the same quality checks before anything is saved.

Step 3: Upload Handbooks

Use the **Upload handbook PDF** tab to add your student handbook and staff handbook. The platform splits each document into sections so answers can cite the specific passage rather than the whole document. Until handbooks are added, the Library shows a reminder and answers draw from board policies only.

Step 4: Manage Your Sources

The Library lists every source with its health at a glance.

Library

Search all 332 policies...

+ Add source

All sources (1)

Policies (1)

Student handbook (0)

Staff handbook (0)

Archived (9)

TITLE		ROWS	HEALTH	UPDATED	SOURCE	
Sarasota Board Policies	ACTIVE	332	Good	Jul 24	Scraper: Table-based	

Your student handbook and staff handbook hasn't been added — related questions will answer from policies only.

Add it now

Figure 2. The Library. Each row shows title, row count, health, and the action buttons.

Action	Icon	What it does
Open full reader	Overlapping squares	Opens the complete document in a printable reader with search and section navigation.
Set active	Checkmark	Makes a dataset the one answers draw from, when you have more than one policy dataset.
Rename	Pencil	Changes the display title of a source.
Archive	Down arrow	Excludes a source from answers while keeping it for your records. Restore any time.
Delete	Trash can	Permanently removes the source and its content. This cannot be undone.

Archive versus delete: When a policy manual is superseded, archive the old dataset rather than deleting it. Archived sources are excluded from answers but preserved for reference, which matters if you ever need to show what guidance was in effect on a given date.

Step 5: Verify the Setup

- 1 Check the counts.** The Library pills show totals for policies and each handbook. Confirm they match your expectations.
- 2 Search for a known policy.** Use the Library search to find a policy you know well, open it, and confirm the text is complete and readable.
- 3 Ask a test question.** Return to the Assistant and ask a scenario you know the answer to. Confirm the citations point at the right policies and the evidence panel shows the correct text.

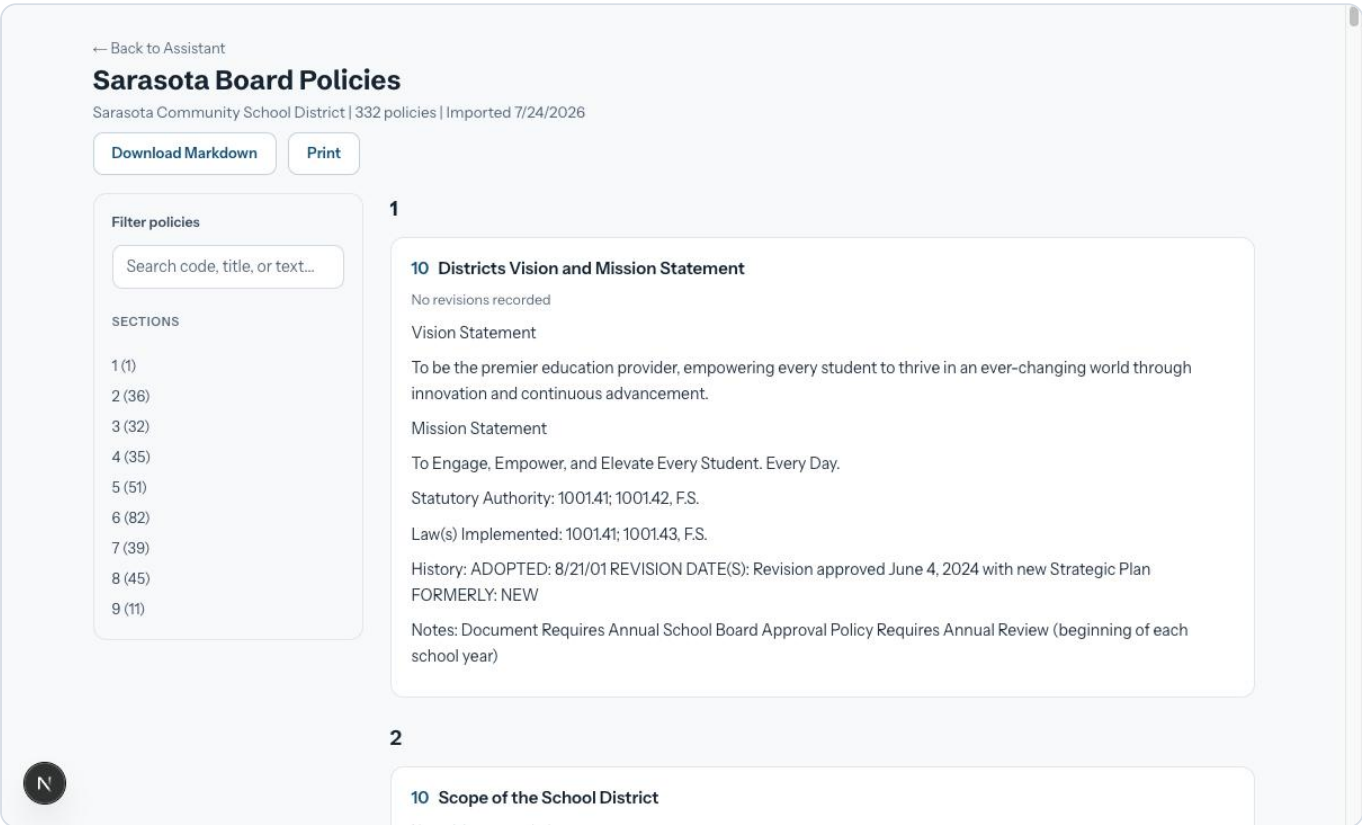


Figure 3. The full reader. Every imported policy is browsable, searchable, printable, and exportable.

Keeping Sources Current

When your board adopts or revises policies, re-import from your policy site or upload a fresh CSV, then archive the outdated dataset and set the new one active. Users see the change immediately; nothing needs to be reconfigured on their end. A once-per-semester refresh keeps answers aligned with your current manual.

Policy to Action · District Setup Guide · Sources you upload stay private to your district's workspace. Guidance is generated from your uploaded policies and is not legal advice.