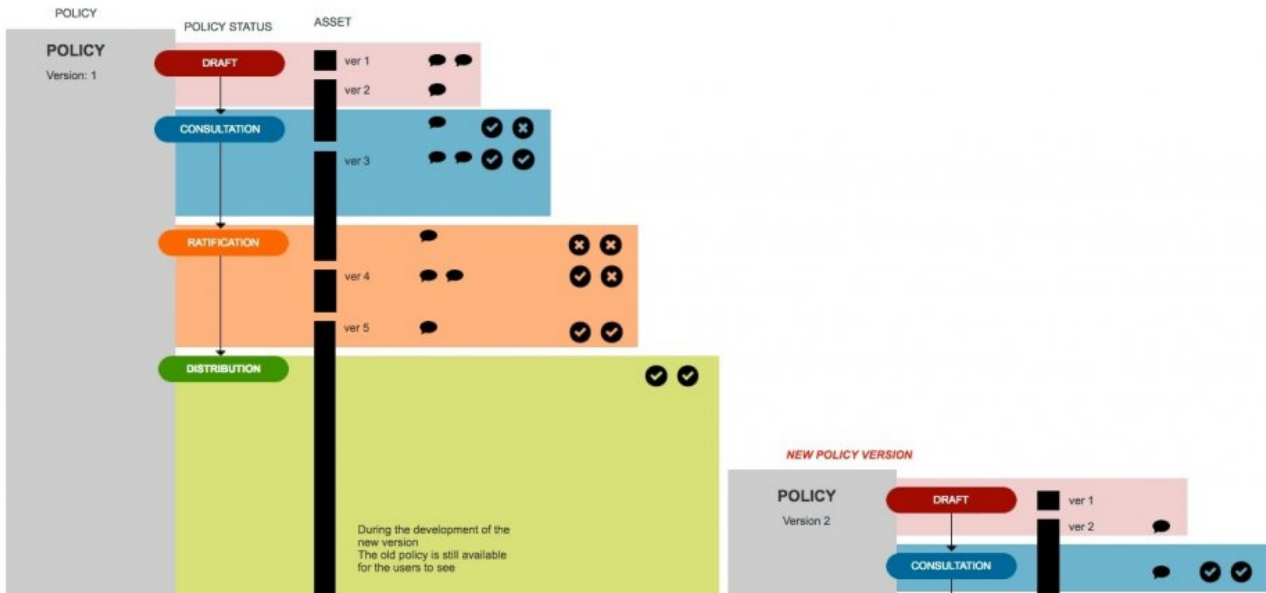




Policy Manager Lifecycle and Workflow

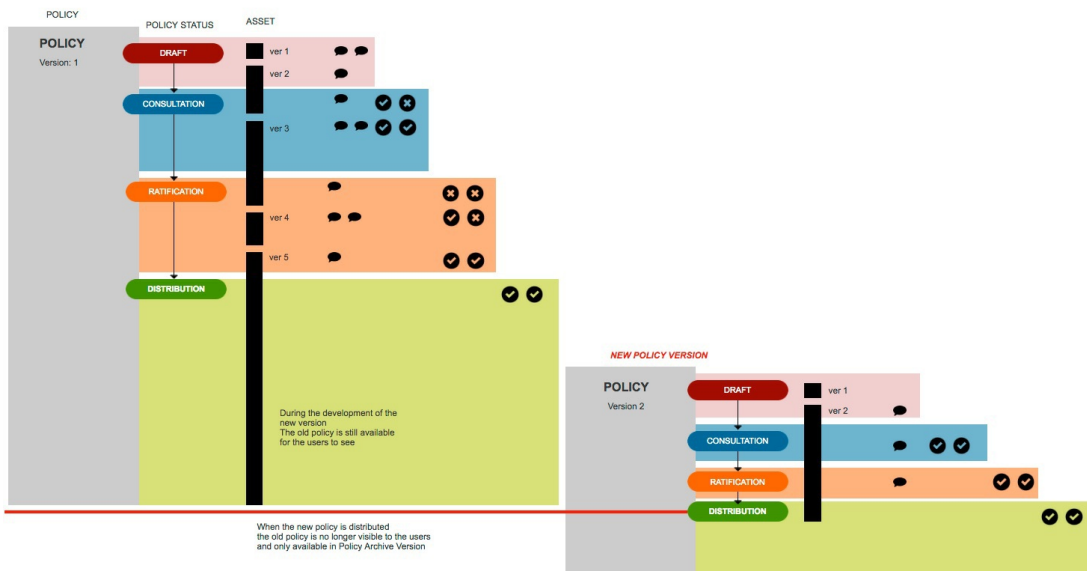
Overview

Policy Manager helps organisations to maintain and manage the lifecycle of policies or procedures. It guides the process of policy creation, consultation, ratification, and distribution, all of which can be audited and tracked.

Version

1.10.3 +

Lifecycle Diagram



Status: DRAFT

During this status, a policy is created as an initial draft for review.

- During this stage, feedback can be provided by users who have "Edit Properties" and "Edit Content" permissions.
- Policy assets such as files, links, documents, and content can be updated accordingly, while version controlled is maintained.
- At this stage, the policy can only be accessed from the "Manage Policy" area.

Status: CONSULTATION

During this status, the appropriate team members can approve or reject a policy.

- Users who are assigned the "Feedback Consultancy" permissions have the ability to approve or reject policies that are moved to the "Consultation" status.

Status: RATIFICATION

Ratification is the next step after policy pass consultation stage, member of Ratification team must Approve/ Reject a policy before policy can be distributed.

Status: DISTRIBUTION

This is the final stage in which policy has become active, users in target distribution will receive notification indicating that they must read and understood the policy. The progress of this stage can be tracked and quick reminder to who has not approved can be sent.

It is not possible to edit policy at the Distribution stage, but you have 2 options, either to Recall the policy or to prepare a new version of the policy in which the same cycle above is going to take place.

When the new version of policy reaches Distribution stage, the previous version will be automatically archived and only be accessible from the Policy History

Last modified on 1 December 2023 by Hannah Door

Created on 18 May 2016 by Michael Christian

Tags: policy, status, workflow