

How to use the Policy Manager Admin



by Michael Hassman on 10 November 2018

The Policy Manager Admin panel has a variety of configuration options

Policy Permissions

This section allows for users to adjust the permissions for any pre existing policy.

To change permissions for a certain policy, select the key icon to the right of the desired policy









Admin / Policy Admin / Policy permissions

Policy permissions

Keywords Status - Active -

Advanced search

Search Reset Export to CSV

Reference	Title	Asset	Type	Status	Review Date	Action
POL - 0004	Example	Page	Documents	Distribution	16 August 2019	 
POL-0003	Induction Process	File		Distribution	30 April 2018	 
POL-0002	Flexible Working	File		Distribution	30 April 2018	 
POL-0001	Health and Safety	File		Distribution	30 April 2018	 

Categories

The categories section allows for users to create new categories for structuring your policies and to enhance searching functionality.

When you add a new category it is also possible to define the permission of who can view and add policies to the category.

Admin / Policy Admin / Categories / Edit Category

Policy permissions

- Categories
- Types
- Status details
- Policy default permissions
- User report permissions
- Settings

Add category

Title*

Parent

Permissions

View Policy
 Add Policy
[View effective permissions...](#)

If needed and if there any other categories already, it is possible to define a parent category at this time, turning this into a subcategory for even more granular categorisation.

Types

Allows for further filtering and sorting of your policies. Though unlike categories there are no permissions to be given based on newly created types

Status Details

The status details section allows for the creation of new status to be added to your newly created policies allowing for an approval workflow.

Admin / Policy Admin / Status Details

Policy permissions

- Categories
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Status details

Enabled	Name*	Duration (days)	Rights Label*
<input checked="" type="checkbox"/>	Draft Draft	<input type="text" value="10"/>	n/a
<input checked="" type="checkbox"/>	<input type="text" value="Consultancy"/> Consultancy	<input type="text"/>	<input type="text" value="Feedback Consultancy"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Distribution Distribution	<input type="text"/>	n/a
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Archive Archive	n/a	n/a

By default only the draft and distribution status exist. but it is possible to add up to two status between these and another two after distribution.

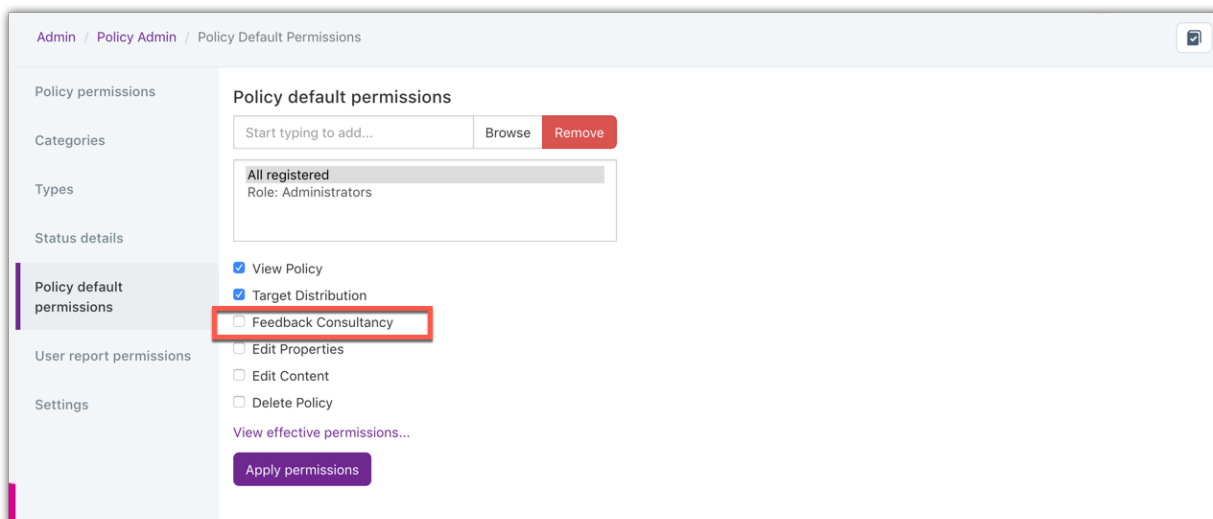
The intention of the status is to create an approval process and an archiving process respectively.

Each status must be checked then a name provided as well as a rights label (How this status will look when giving permissions). You can also add a default duration for the status meaning that when moved to said status a reminder will be sent to consider updating the status when reaching the time specified.

Default Policy Permissions

Enable you to define the standard permissions for all future policies you create. Whatever you define the permissions to be here will then be set automatically upon creating a new policy. Although it is possible after setting the default permissions, to change the individual permissions of each policy. The intention here is just to create a standard and change them as needed depending on the nature of future policies

As mentioned and new status you have added to the status details will now show when looking at the policy permissions (Except for the final 'archived' status) allowing for specific users to interact with the policy at the relevant stage



User Report Permissions

Any users specified in the permissions field allows for users to have access to the reports aspect of Policy Manager from the front end of the system.

The Policy Manager Reports allow you to run a report on all users and if they have accepted the relevant policies. You can filter what you wish to report with the results showing below

Policy Manager / Policy Users Report

+ Add a policy

Acceptance Report Approval Report

Approved Status - Both -

Categories Select categories...

User list Start typing to add... Browse Remove

Status - Active -

Type - No Type -

View matching users...

Search Reset

Export to CSV

Settings

The final option within the admin pannel allows for users to adjust some features adjust the visibilty and accessability of the Policy Manager

This includes setting a default policy reference pattern allowing for all your policies to follow the same reference withiut having to retype it on each policy.

Defining how many policies are listed per page on the front end of Policy Manager.

The final option is to enable minor edits to policies. With this not selected any changes you need to make to a policy will create a new version meaning all user who have accepted the policy will have to accept it again. This option is incredibly useful to adjust any spelling mistakes as it will allow you to make changes to a policy without creating a new version of the policy.