



Policy Manager Admin

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](#)

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 this 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 Browse Remove

All registered

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

Update

If needed and if there any other categories already, it is possible to define a parent category at this time, turning this into a sub-category 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
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Status details

Enabled	Name*	Duration (days)	Rights Label*
<input checked="" type="checkbox"/>	Draft Draft	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

Submit

By default, only the Draft and Distribution status exist, but it is possible to add up to two statuses 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, provided a name, 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

These 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.

We recommend creating an Intranet role for the purpose of giving Intranet administrators policy permissions en masse. Ensure this 'Policy administrator' role is entered into permissions for every policy with all rights. This ensures easy management going forward as more policies are added and single user names haven't been entered.

As mentioned, the 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.

Admin / Policy Admin / Policy Default Permissions

Policy permissions

Categories

Types

Status details

Policy default permissions

User report permissions

Settings

Policy default permissions

Start typing to add... Browse Remove

All registered
Role: Administrators

☒ View Policy

☒ Target Distribution

☐ Feedback Consultancy

☐ Edit Properties

☐ Edit Content

☐ Delete Policy

View effective permissions...

Apply permissions

User Report Permissions

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

Policy Manager Reports allow you to run a report on all users and view 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 -

Status - Active -

Categories Select categories...

Type - No Type -

User list

Start typing to add... Browse Remove

View matching users...

Search Reset

Export to CSV

Settings

The final option within the admin panel allows for users to adjust some features related to the visibility and accessibility of the Policy Manager.

This includes setting a default policy reference pattern allowing for all your policies to follow the same reference without

having to re-type 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 option not selected, any changes you need to make to a policy will create a new version meaning all users 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 small changes without creating a new version of the policy.

This is especially important as accepting a policy can be a legal requirement, so making edits beyond rectifying spelling errors should require a new version to be published.

Last modified on 1 December 2023 by [Hannah Door](#)

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Tags: [admin](#), [administrator](#), [policy](#)