



Policy Manager: Admin Overview

Application administrators of Policy Manager need to set up the admin side of the application before it can be used.

In particular, the category and default policy permissions tabs need to be configured before content can start to be added.

Once the application has content in it, administrators can use the admin side controls to assist in the ongoing management of the policies over time.

This guide will cover all tabs available on the admin side and what they control.

The admin side

Head to Applications > Admin > Policy Manager to see all tabs.

- Policy Permissions

This tab will be opened by default.

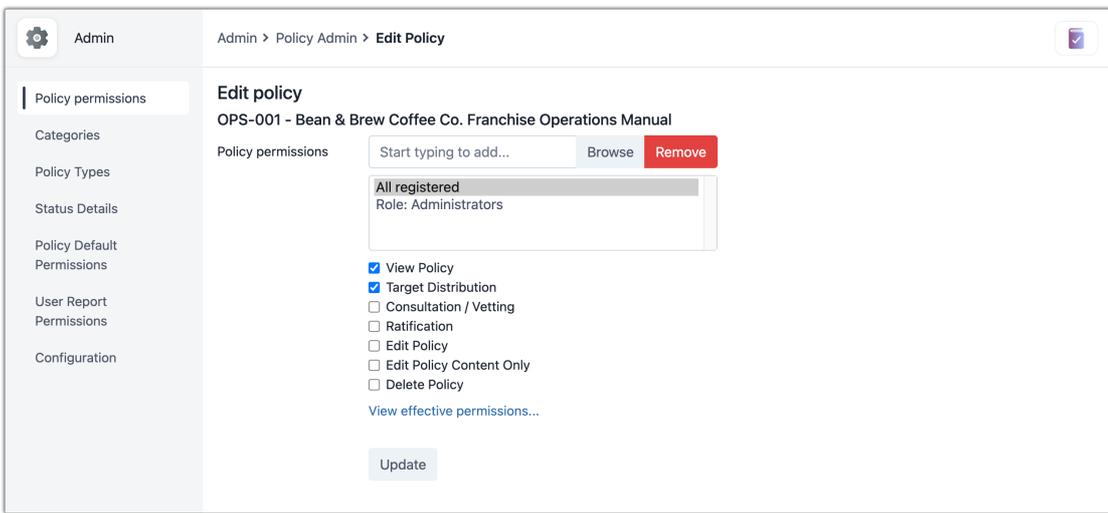
From here, administrators can see all policies and edit their permissions if needed.

The screenshot shows the 'Policy permissions' tab in the Admin interface. It includes a search bar with a 'Keywords' field and a 'Status' dropdown set to '- Active -'. Below the search bar are 'Advanced search', 'Search', and 'Reset' buttons, along with an 'Export to CSV' button. A table lists several policies with columns for Reference, Title, Asset, Type, Status, Review Date, and Action.

Reference	Title	Asset	Type	Status	Review Date	Action
OPS-001	Bean & Brew Coffee Co. Franchise Operations Manual	Page	Procedures	Distribution		Key Trash
INS-0002	Foreign travel advice	Weblink	Instruction	Distribution		Key Trash
PDR-0003	Audit Procedures	Page	Procedures	Distribution	7 March 2027	Key Trash
POL-0003	Sustainability Policy	Page	Policies	Distribution	23 May 2027	Key Trash
PDR-0002	Security Procedures	Page	Procedures	Consultation	30 August 2026	Key Trash
PDR-0001	Complaints Procedures	Page	Procedures	Distribution		Key Trash

A keyword and advanced search are available at the top of the screen.

Click the key symbol to edit the permissions for a policy.

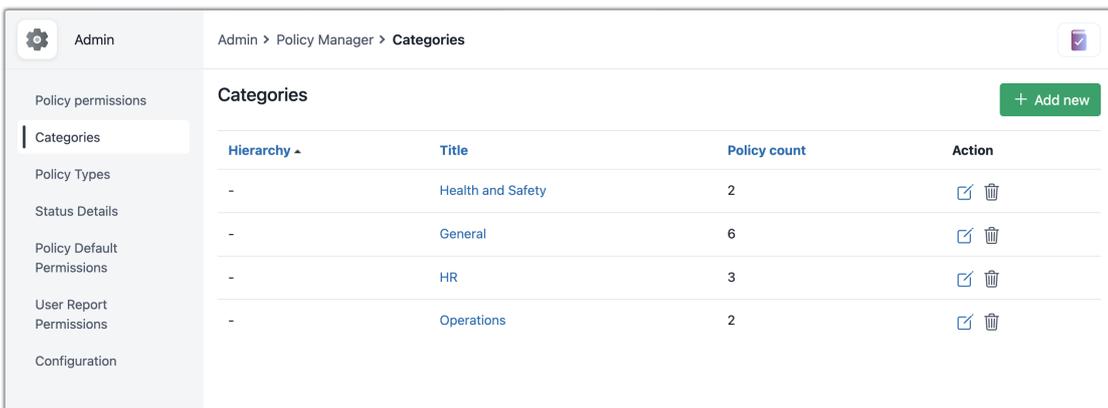


Click the bin icon to delete a policy. (This is a permanent change and data cannot be retrieved) As there is no trash can in Policy Manager, consider archiving a policy rather than deleting it.

- Categories

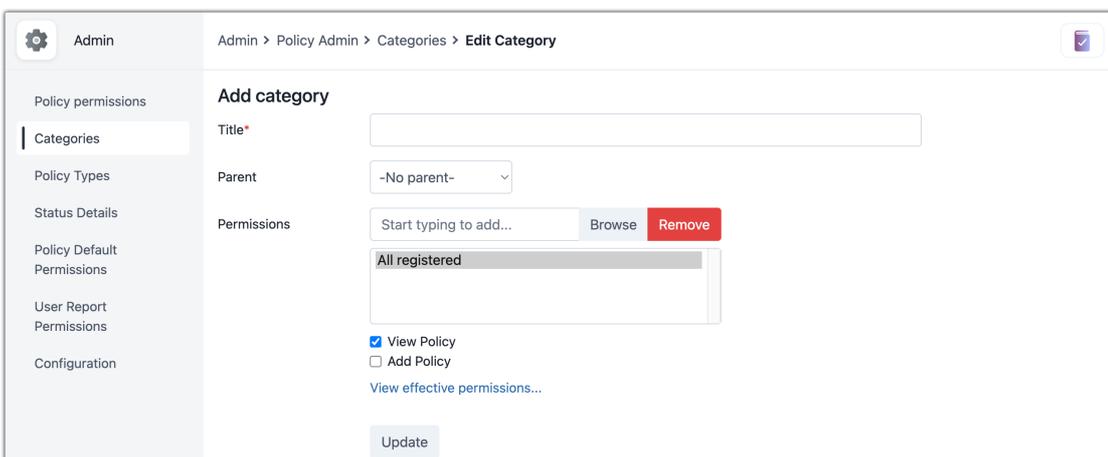
Here, categories that policies will be saved under can be created.

Parent and subcategory structure can be set up to best organise your content.



Consider the categories your company needs and create these; they will appear on the front end for users to create policies within.

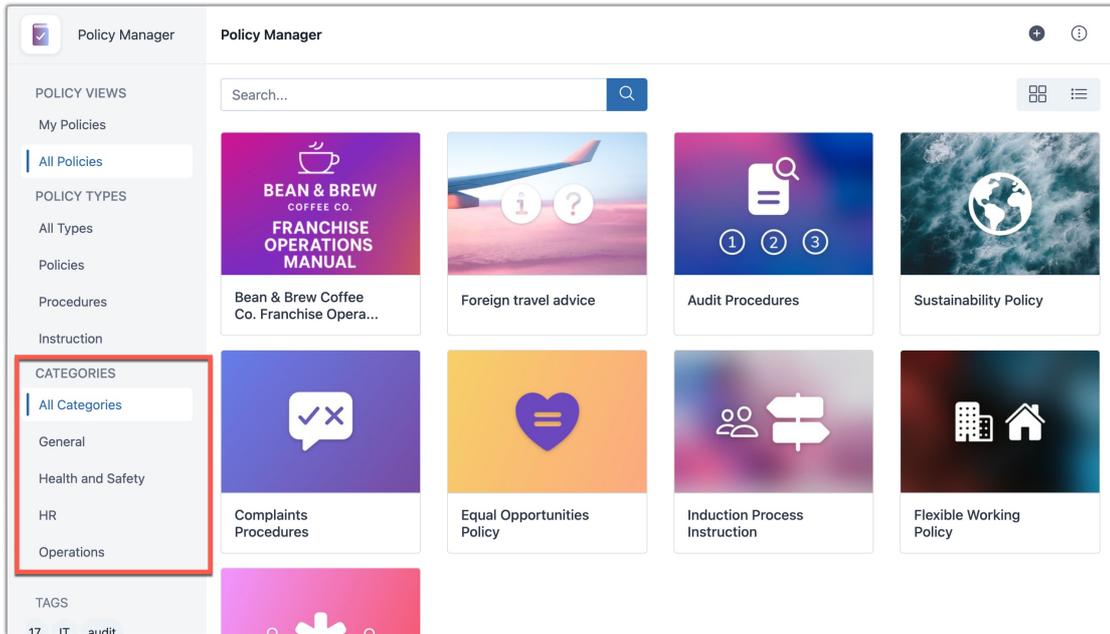
The category is the first place a user needs permission to view content, so ensure you enter the appropriate users/roles/groups with permissions to view and or have the ability to create a policy within it.



Over time, new categories can be created, or administrators can change the permissions set on each category as needed.

On the front end, users with permissions to create policies in a category will see it listed when they are adding new ones.

Categories also act as a filter to show only policies saved under the one clicked on

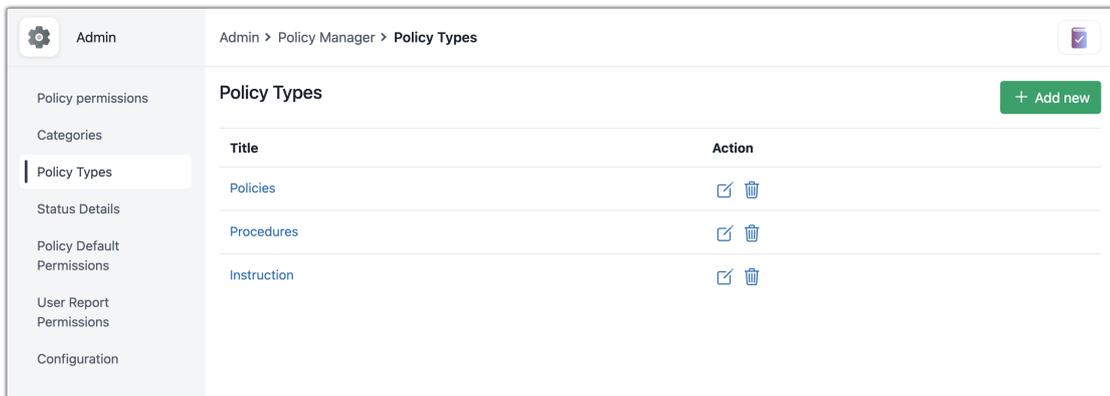


- Policy types

These are optional to create and attribute to policies.

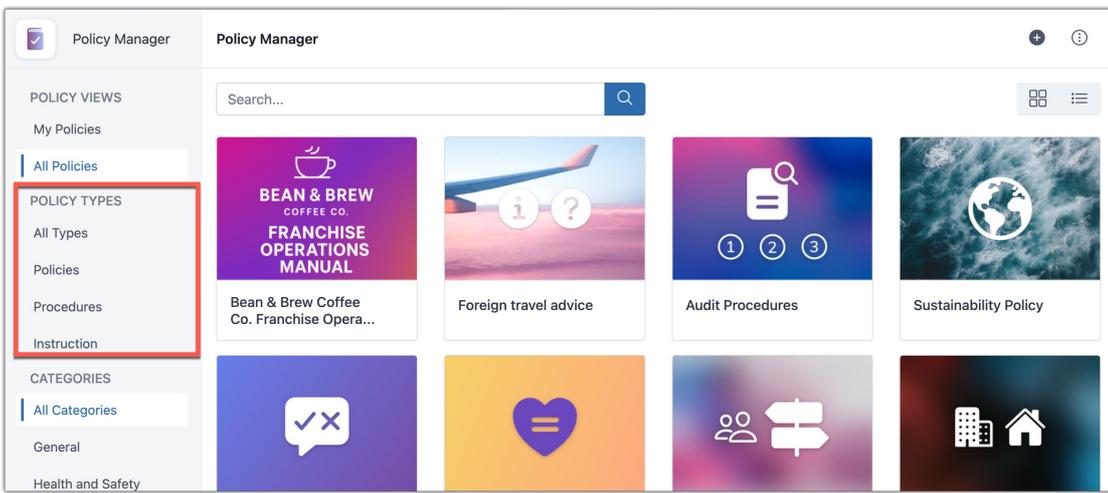
They allow for further differentiation for filtering on the front end if the categories already in use are not enough.

There are no permissions tied to policy types.



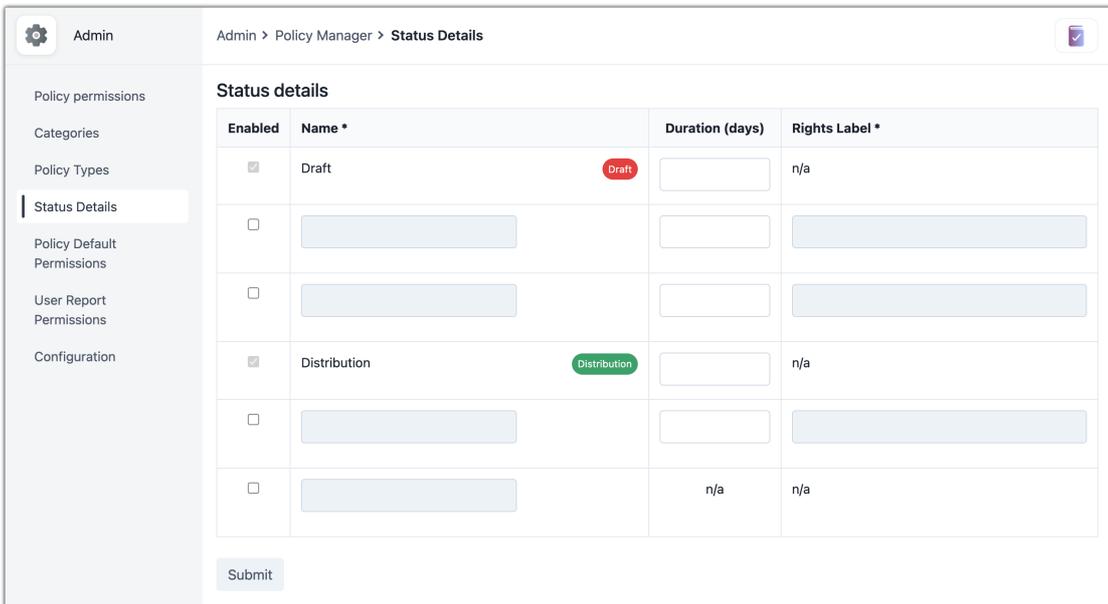
Users with permissions to create policies will be able to see all types listed on the front end and be able to attribute them to their policies if applicable.

The types will appear on the front end for users to click on and see policies with that label.



- Status details

This tab is where an approval process can be set up; our guide that covers this in detail is [here](#).



A 'draft' and 'distribution' status are hardcoded in this area and cannot be removed, as they are fundamental for Policy Manager to work.

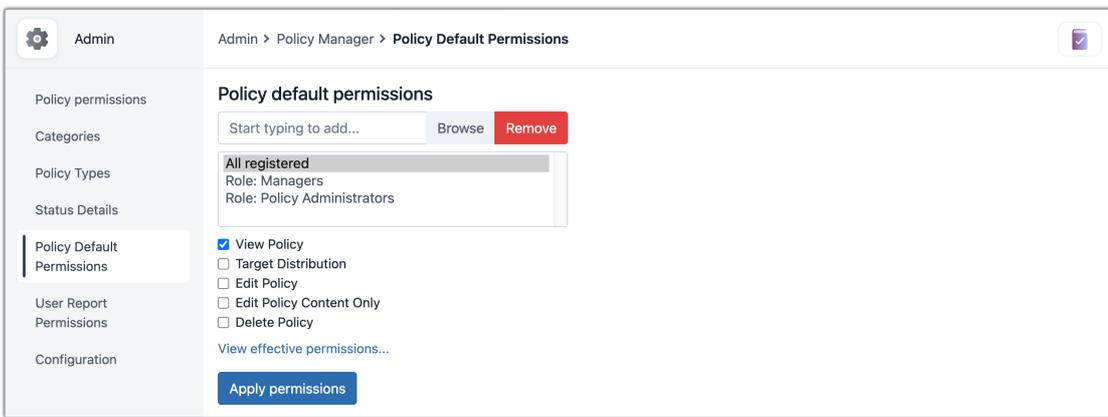
Administrators can add more statuses to create an approval process if they wish.

- Default policy permissions

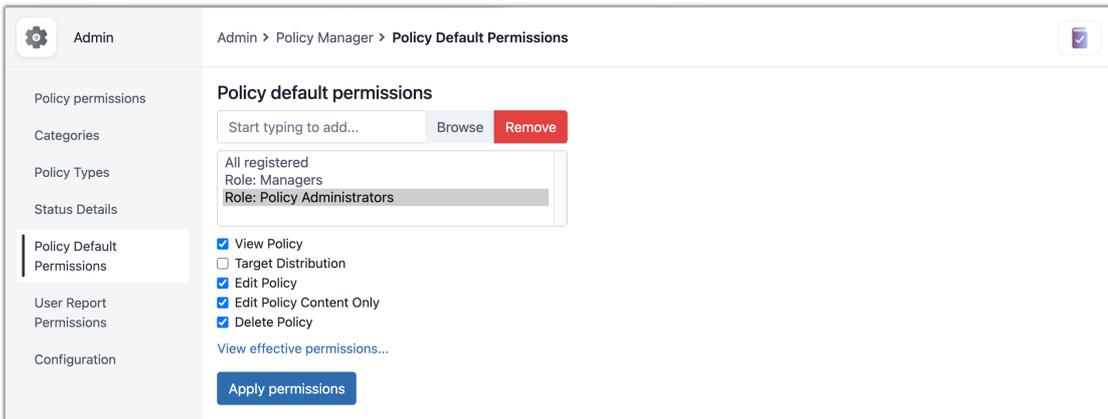
A very important tab to set up before Policy content starts to be added.

The permissions entered here will automatically pre-populate for any new policy that is created.

Which means what administrators enter here will speed up the policy creation process significantly, as usually the same users/roles/groups are needed across the majority of policies.



We recommend using 'All registered ' with the ability to 'view', then a 'Policy administrator' role or similar with all admin permissions.



This means that when users with permissions create policies, these permissions will already be entered, and they can simply tweak what is already there to best fit their policy.

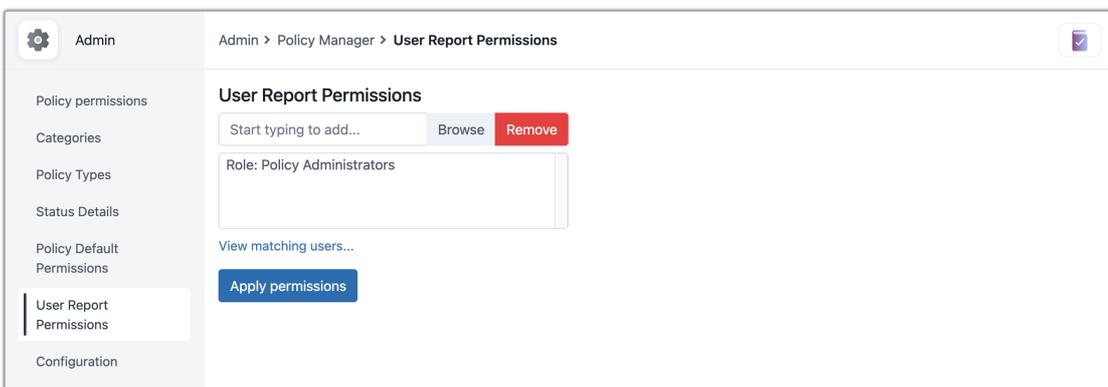
This ensures consistency across policies as the same users/roles/groups have been used, which means there should be no access issues.

One important thing to note is that the Policy Creator will need to set the 'target disruption' if needed, or administrators can include that permission in the default.

Tip: We recommend establishing an Intranet role specifically for granting administrators policy permissions. Make sure to include this **Policy Administrator** role in the permissions list for every policy, granting it full rights. This approach simplifies ongoing management as new policies are added, eliminating the need to assign permissions to individual users each time.

- User report permissions

Here, administrators can enter users/roles/groups who should have access to [policy reports](#) on the front end.



- Configuration

Administrators can adjust features related to the visibility and accessibility of the Policy Manager.

Admin > Policy Manager > Configuration

Configuration

Policy Reference Pattern

Policy items per page

Allow minor edits
This allows policy content to be edited during the distribution stage by creating a new version of the asset. It should only be used for minor edits such as correcting spelling errors. Users who have accepted the policy will not be asked to accept it again. The asset version accepted by the user is tracked.
 Yes No

Filters display
Display the filters menu when viewing a single policy
 Yes No

Set Policy Manager landing page to All Policies
 Yes No

Show download as PDF
 Yes No

[Save Configuration](#)

- Policy reference pattern: Enter a code to appear against all policies when created
- Policy items per page: How many policies to show per page
- Allow minor edits: Select 'yes' if edits can be made to live policies to fix spelling or other errors
- Filters display: Show or hide filters on the left of the screen when in a policy
- Landing page: Set which tab is opened by default (If 'no' the default tab will be 'My policies')
- Show download as PDF: Set whether a button should download policies to PDF appears

Created on 19 March 2026 by [Hannah Door](#)

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