

Mandatory Policies

When creating a policy you may wish for this to be deemed mandatory for certain (if not all) users to read and confirm.

This can be done within the permissions upon creating a policy.

The screenshot shows a web interface for creating a policy. At the top, there are three tabs: 'Summary' (checked), 'Related Items', and 'Permissions' (active). Below the tabs, the title 'POL - Title' is displayed. The 'Policy Permissions' section includes a search input field with the placeholder text 'Start typing to add...', a 'Browse' button, and a red 'Remove' button. A dropdown menu is open, showing 'All registered' and 'Role: Administrators'. Below this, there is a list of permissions with checkboxes: 'View Policy' (checked), 'Target Distribution' (checked), 'Feedback Consultancy' (unchecked), 'Edit Properties' (unchecked), 'Edit Content' (unchecked), and 'Delete Policy' (unchecked). A link 'View effective permissions...' is visible below the list. At the bottom, there is a purple 'Submit' button.

Image 1: The permissions tab when creating a new policy

The majority of permissions here are fairly standard across all of Claromentis applications, allowing for viewing, editing and deleting etc. However, there is one permission here that is unique to Policy Manager - 'Target Distribution'. This permission is what we need to define if a policy is mandatory for a specific individual or group of users.

When this option has been selected for a group you are included in you will see this appear when accessing the front end of Policy Manager once this policy has been moved to the distribution status.

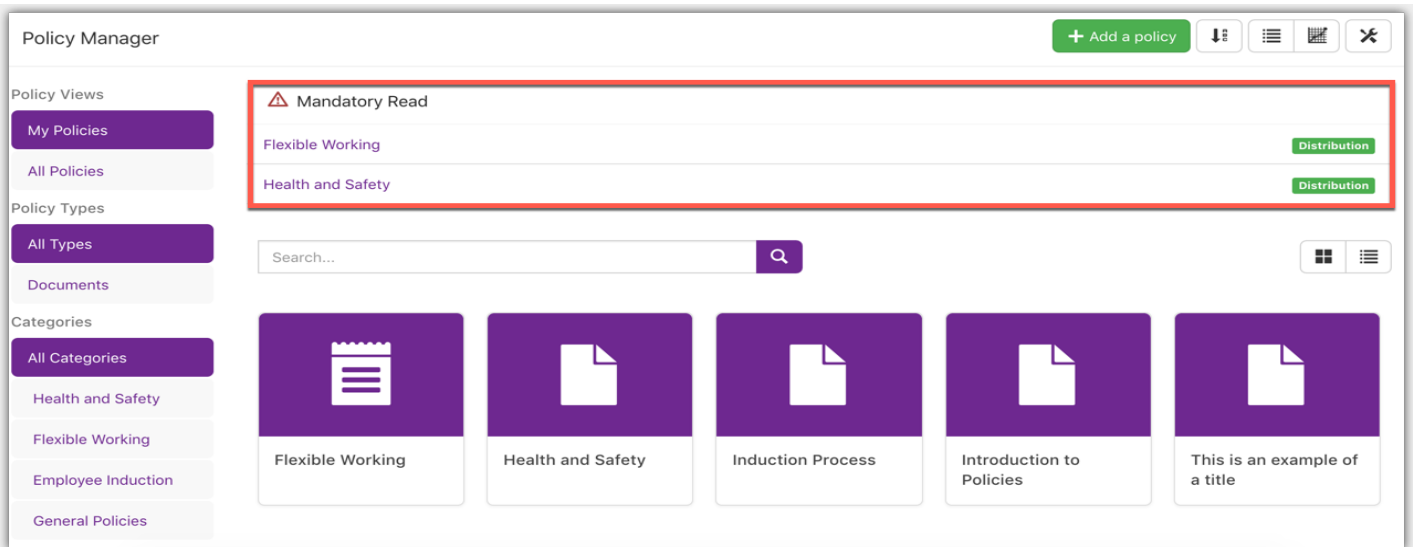


Image 2: The front end view of the policy manager

As displayed any policies that are deemed mandatory for you as an individual will be listed at the top of the screen whereas policies you have viewing permissions to and/or have already accepted will be displayed at the bottom.

When accessing one of your mandatory policies you will be introduced to this screen.

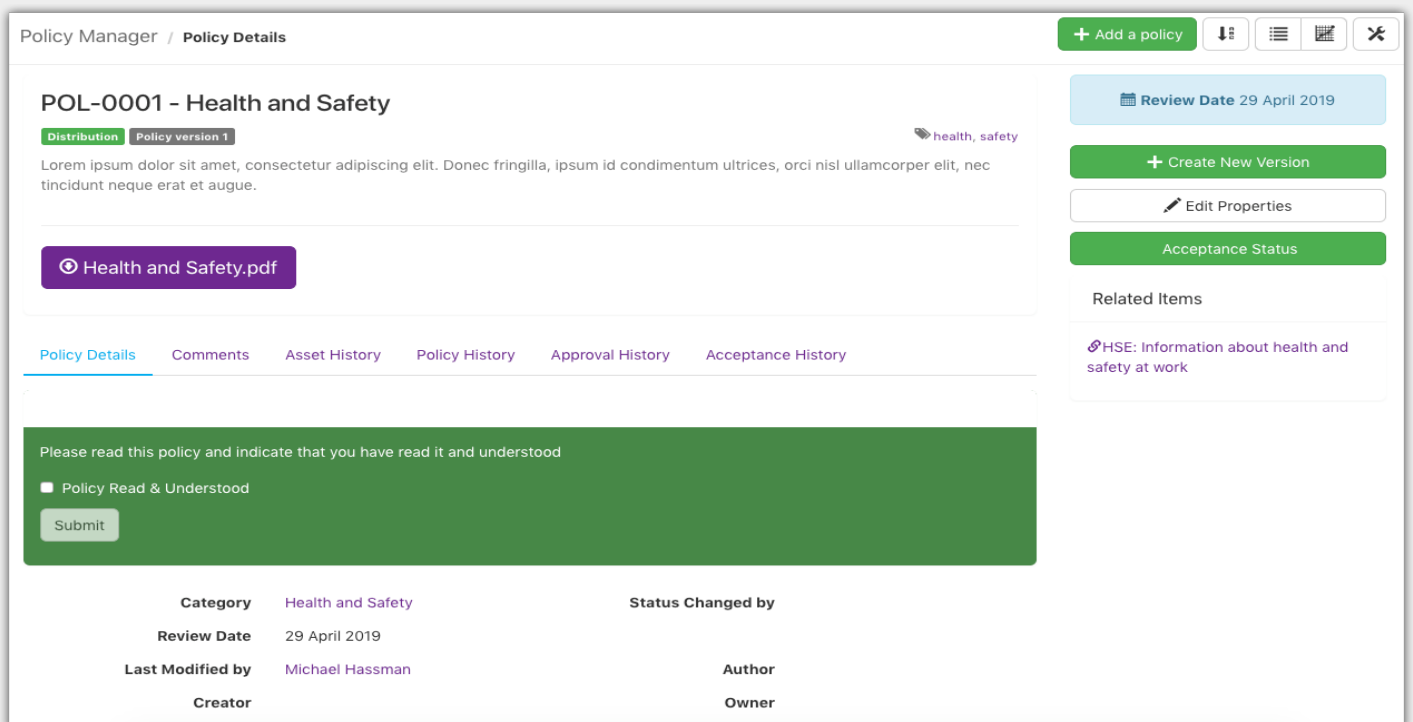


Image 3: A policy view when you are the target distribution

This will allow you as a user to confirm the policy. Confirming that you have read and understood the content of the documentation.

Please note: It is not actually required for the user to read the documentation before confirming. Though if they do this and then breach this policy then they can be held accountable as they are confirming their understanding of the policy.

With the appropriate permissions you will also have access to the 'Acceptance Status' button on the

right hand side of the page above.

This will allow you to observe the full list of users this policy has been sent to as a mandatory policy as well as being able to view if they have accepted the policy and send reminders to users who have yet to do so, by clicking the send reminder button on the right hand side.

Policy Manager / POL-0003 - Induction Process / Acceptance Status

+ Add a policy

Search.. All Accepted Not Yet Accepted filter

Accepted 4

Not Yet Accepted 59

Target Distribution 63

Export to CSV Send reminder

Name	Status	Asset Version	Date
Barclay Martin	✓	1	07-05-2015 19:38
Dave Arril	✓	1	06-07-2016 19:58
Claromentis Administrator	✓	1	21-07-2016 14:40
Michael Hassman	✓	1	12-10-2018 15:13
Jennifer Langdon	-		
Pippa Fraser	-		
Vanessa Wright	-		
Stephanie Hunter	-		
Victor McLean	-		
Jason Reid	-		

Image 4: Acceptance status view

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