Link to article: https://discover.claromentis.com/knowledgebase/articles/512/policy-acceptance



Policy Acceptance

When creating a policy you may wish for this to be deemed mandatory for certain (if not all) users to read & confirm. This can be done within the permissions upon creating a policy.

The majority of permissions are fairly standard across all of Claromentis applications, allowing for Viewing, Editing, and Deleting, etc. However, there is one permisson that is unique to the 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.

Summary 🔲 Related It	ems 🏾 🤁 Permissions			
Policy Permisions	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.			

Image 1: The permssions tab when creating a new policy

When you are part of the Target Distribution group, you will see the policy appear when accessing the front-end. The policy will only display when in the Distribution status which means it is ready for you to read & confirm.

Please note: 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.



Image 2: The front end view of the policy manager

When accessing one of your mandatory policies, you will be introduced to this screen where you can confirm the policy.

licy Manager / Policy Deta	ails		+ Add a policy
POL-0001 - Health	and Safety		📾 Review Date 29 April 2019
Oistribution Palety version 1 Pelety version 1 Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec fringilla, ipsum id condimentum ultrices, orci nisi ullamcorper elit, nec tincidunt neque erat et augue.		+ Create New Version	
		🖍 Edit Properties	
𝔊 Health and Safety.pdf			Acceptance Status
			Related Items
olicy Details Comments	Asset History Policy Histo	ry Approval History Acceptance History	\mathscr{O} HSE: Information about health and safety at work
lease read this policy and indi Policy Read & Understood Submit	cate that you have read it and unc	derstood	
Category	Health and Safety	Status Changed by	
	29 April 2019		
Review Date			
Review Date Last Modified by	Michael Hassman	Author	

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

Confirming the policy indicates 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 be 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 Pro	ocess / Acceptance Status		+ Add a policy	t: III ₩ ×
Search	• All 🔿 Accepted 🔿 Not	Yet Accepted filter		
\odot	Accepted 4	Not Yet Acce	59	Target Distribution 63
Export to CSV				Send reminder
Name	Status	Asset Version	Date	
Barclay Martin	0	1	07-05-2015 19:38	
Dave Arril	Ø	1	06-07-2016 19:58	
Claromentis Administrator	0	1	21-07-2016 14:40	
Michael Hassman	0	1	12-10-2018 15:13	
Jennifer Langdon	-			
Pippa Fraser	-			
Vanessa Wright	-			
Stephanie Hunter	-			
Victor McLean	-			
Jason Reid	-			

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