

Creating an approval process in Policy Manager

As a standard the Policy Manager has two statuses; Draft and Distribution. However if needed through the admin panel it is possible to add an additional two statuses between draft and distribution to allow for different levels of approval.

In order to create these additional statuses from the admin panel, head to the 'Status Details' tab (image 1)

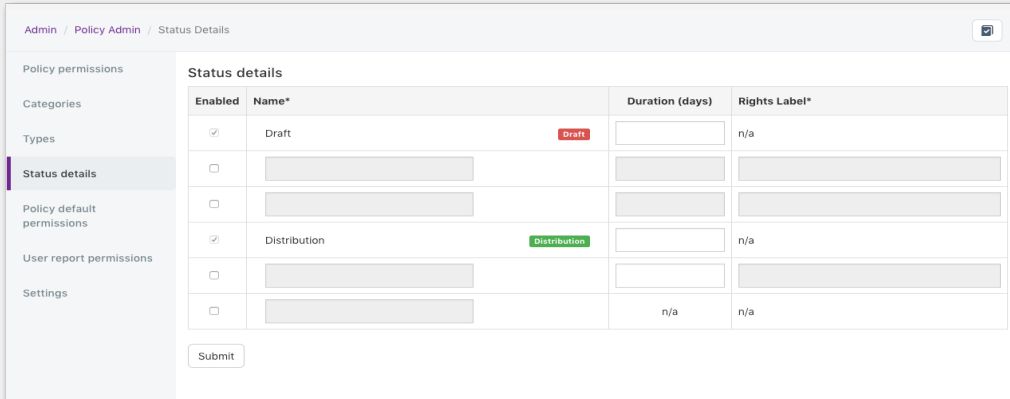


Image 1: a view of the status details tab when viewing it for the first time

Here we will see the Draft and Distribution status which cannot be removed or edited, but in between them are two additional sections with check boxes to enable additional status.

Please note: although we can see there are two additional areas to add status after the Distribution status these are not tied to an approval process and are used more for archiving a policy instead.

With the options available we can have two levels of approval going to separate groups of users to sign off the policy. When filling out these fields we are required to at least fill out the name, which is what the status will be called, and the rights label which defines what its permissions to interact with this status will be called. (image 2)

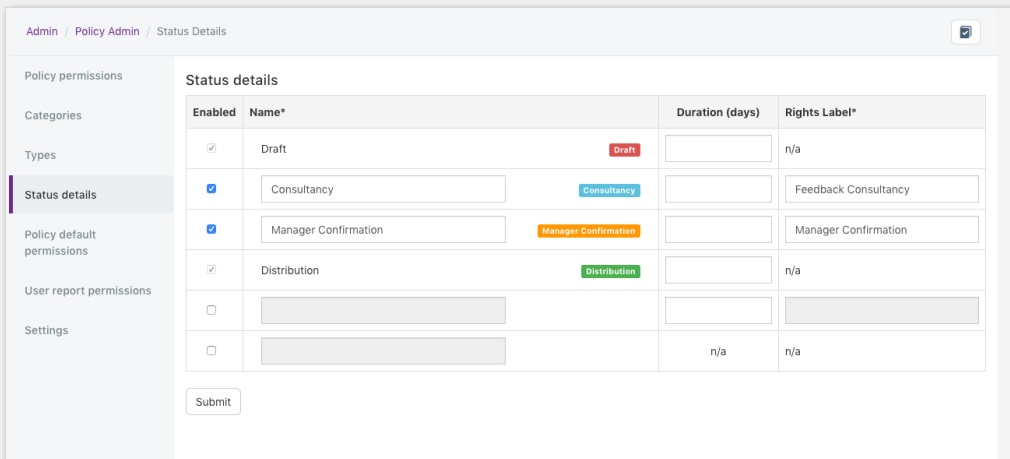


Image 2: An example of two approval status that can be used

Once you are happy with your new statuses click submit. You will then be able to define who has the permissions to access the policy when in these new status.

You can either do this for each individual policy you create from now on (image3) or configure the default policy permissions to define who can approve these as a default across all new policies (image 4).

please note: If you do change the default policy permissions from the admin side, you will still be able to configure unique permissions on a policy to policy basis. The default permissions are simply intended to speed up the permissions process so that your policy permissions will be the same across the majority of your policies.

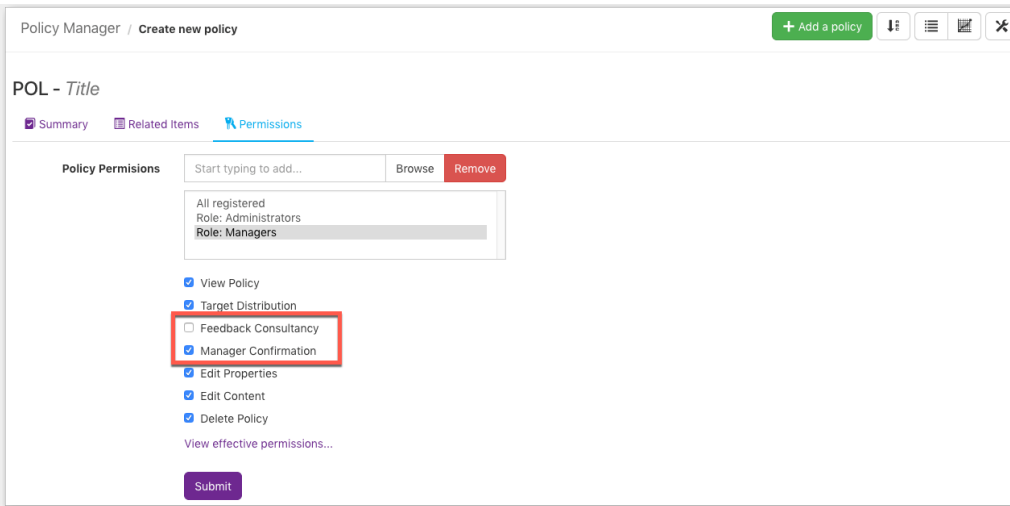


image 3: adjusting the permissions upon creating a new policy

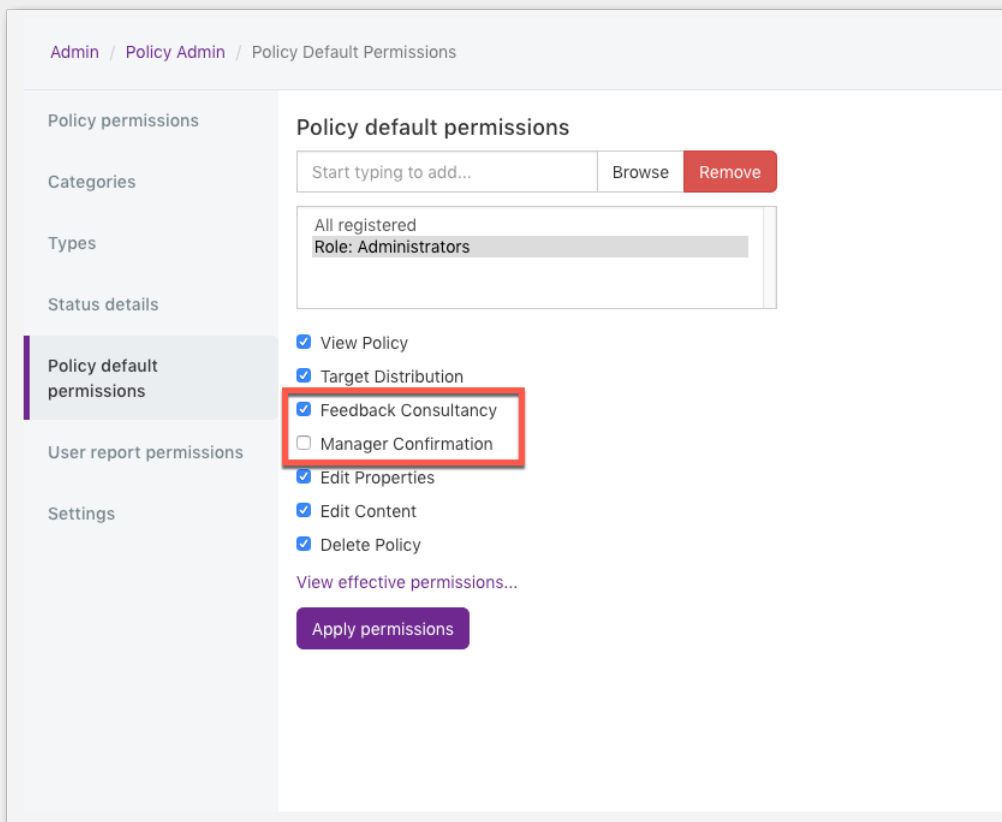


image 4: configuring the default permissions from the "Policy default permissions" tab in admin

With these added you will now have the choice of moving to these statuses before moving to distribution upon creating a new policy, allowing you to apply an approval process to the form if needed (image 5).

Please note: There is no restriction on moving to certain statuses at any point within the policy creation process allowing you to head straight to the distribution status depending on the policy in question

Cover image

Category*

Tags
popular tags: intranet, claromentis, microsoft, excel, social

Asset Type* File upload Page File from Documents Weblink

No file chosen

STATUS Draft Consultancy Manager Confirmation Distribution Archive

Set review Date

Set status expiry Date

Owner*

Author*

Image 5: a list of the status you have available when creating a new policy

When selecting either of the approval statuses, any users with the appropriate permissions will receive a notification asking them to approve the policy. When they access said policy they will be presented with the option to either accept or reject the policy, with the option to also leave a comment (which is mandatory when rejecting the policy). As the policy owner, you can then see if anyone has accepted the policy by viewing the approval history and them move the status on accordingly.

Policy Manager / Policy Details

POL-0001 - Health and Safety

Consultancy Policy version 1 health, safety

Optional comments unless you intend to reject.

Category Health and Safety **Status Changed by** Michael Hassman

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Last Modified by Michael Hassman **Author**

Creator **Owner**

Image 6: the field that shows when you have permissions to access the approval statuses and the approval history

Last modified on 27 March 2019 by [Mhairi Hutton](#)

Created on 5 February 2019 by [Michael Hassman](#)

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