Creating an Approval Process in Policy Manager

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

In order to create these additional statuses from the admin panel, head to the 'Status Details' tab (as shown in Image 1).

Here you will see the Draft and Distribution status which cannot be removed or edited, but in-between them are two additional sections with checkboxes to enable additional statuses.
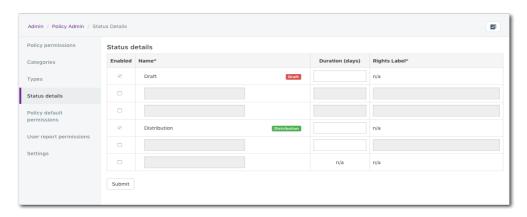

Image 1: A view of the status details tab when viewing it for the first time

Please note: Although 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, you can have two levels of approval going to separate groups of users to sign off the policy. As shown in Image 2, you are required to fill out the name (what the status will be called) and the rights label (how the status will appear when giving permissions).
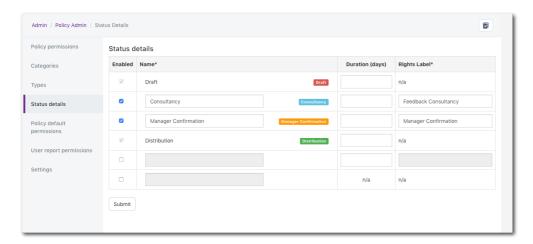
Image 2: An example of two approval statuses that can be used

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 those new statuses.

You can either do this for each individual policy you create from now on (as shown in Image 3) or configure the default policy permissions to define who can approve these as a default across all new policies (as shown in 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.
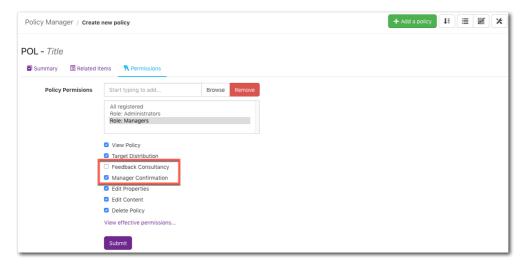

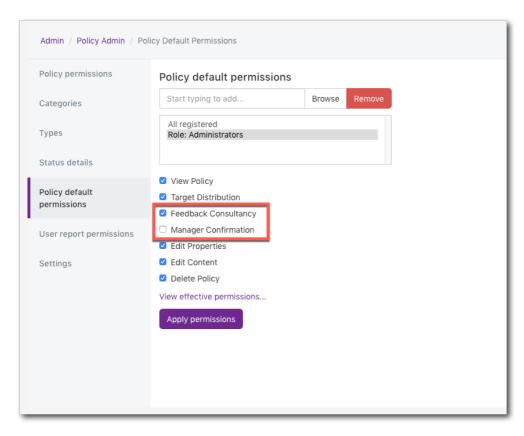*Image 3: Adjusting the permissions upon creating a new policy*

Image 4: Configuring the default permissions from the "Policy default permissions" tab in the admin

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

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.
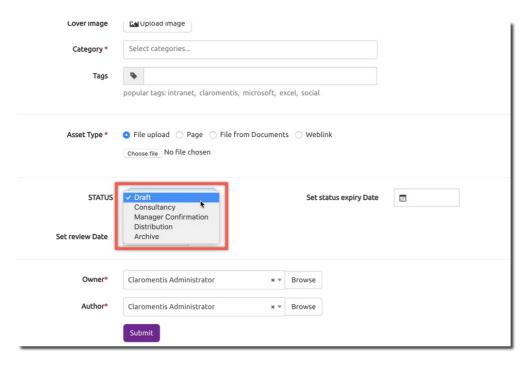

Image 5: A list of the status you have available when creating a new policy

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 the policy, they will be presented with the option to either accept or reject the policy, and the option to also leave a comment (this 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 then moving the status forward accordingly.
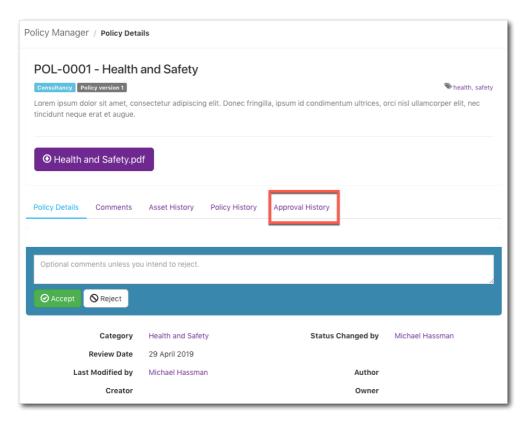
Image 6: The field that shows when you have permissions to access the approval statuses and the approval history

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