



## Policy Manager: Creating an Approval Process

As standard, Policy Manager has two statuses that policies can be moved between: **Draft** and **Distribution**.

The application works perfectly well with these; however, it's possible to set up an approval process and add two additional statuses between Draft and Distribution.

This is an optional feature and does not need to be used unless it's relevant to your team.

### Setting up an approval process

Policy Application administrators can add and manage the two extra approval statuses from [the admin side](#) via **Applications > Admin > Policy Manager > Status details**.

The screenshot shows the 'Status details' configuration page in the Policy Manager admin interface. The page has a sidebar with navigation options: Admin, Policy permissions, Categories, Policy Types, Status Details (selected), Policy Default Permissions, User Report Permissions, and Configuration. The main content area is titled 'Status details' and contains a table with the following columns: Enabled, Name \*, Duration (days), and Rights Label \*. There are six rows in the table. The first row is for 'Draft' (enabled, duration empty, rights label n/a). The second row is for an unnamed status (disabled, duration empty, rights label empty). The third row is for another unnamed status (disabled, duration empty, rights label empty). The fourth row is for 'Distribution' (enabled, duration empty, rights label n/a). The fifth row is for an unnamed status (disabled, duration empty, rights label empty). The sixth row is for another unnamed status (disabled, duration n/a, rights label n/a).

Enabled	Name *	Duration (days)	Rights Label *
<input checked="" type="checkbox"/>	Draft		n/a
<input type="checkbox"/>			
<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Distribution		n/a
<input type="checkbox"/>			
<input type="checkbox"/>		n/a	n/a

**Please note:** The two statuses after the **Distribution** status can be used, but are not part of the approval process and can instead be used as extra archiving review stages.

### 1. Create new approval statuses

Your browser doesn't support video.  
Please download the file: [video/mp4](#)

1. Consider what you want the approval steps to be between **Draft** and **Distribution**.

2. Check the box in line with the row to make the fields editable.
3. Once you're happy with your new statuses, click **Submit** to save them.

## 2. Update permissions across policies

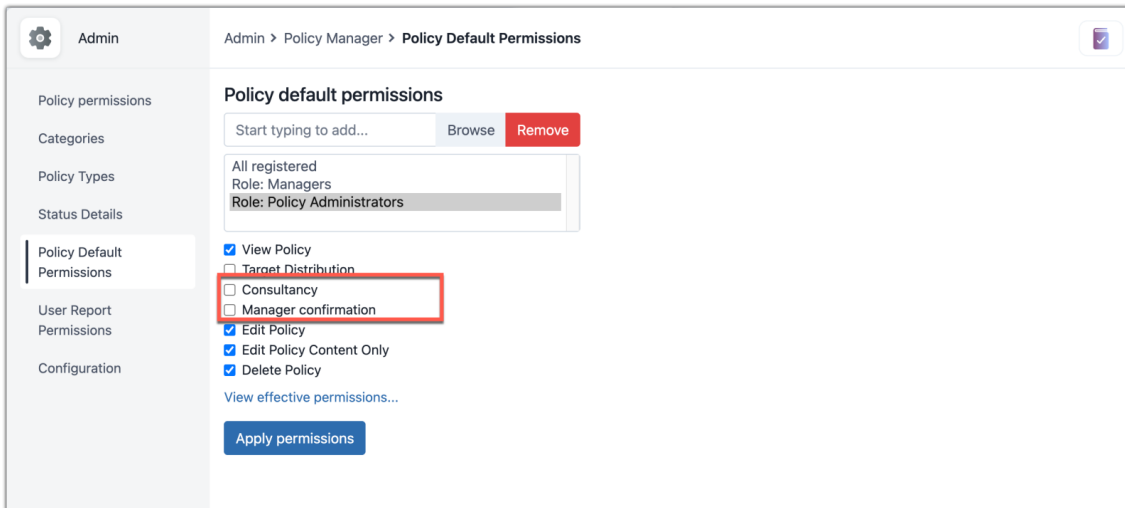
Now that the new approval stages exist, they can be applied to policies created as new or being edited.

Users need to be given permissions to the new statuses to allow them to see and move policies between them.

- **Default policy permissions**

First, the most important place to update this is in the [Default Policy Permissions](#) on the admin side by an administrator. These permissions will then pull through to [every new policy automatically](#), unless the policy creator changes them.

On the admin side, you'll see the corresponding permission listed for each new status.



Your administrators must ensure that the appropriate users, roles, or groups are assigned these new rights and that the configuration is saved.

Doing so ensures that all new policies added from this point onward automatically inherit these permissions and therefore have users who can move them through the approval process as required.

- **What to do for pre-existing policies**

It may be acceptable for all new policies going forward to move through these statuses, with existing policies excluded.

However, if you want existing policies to be included, the new status permission will also need to be granted to the relevant users, roles, or groups.

There is no bulk policy permission update function; instead, these updates are [manually applied per policy](#).

Administrators of Policy Manager or users with **Edit policy** permission can edit each policy and update its permissions to include users, roles, or groups in the new status permissions.

Once applied, existing policies can be edited and moved through the statuses as needed by users who have the corresponding permissions.



## How the process works in practice

1. When a new policy is created (or edited), the new statuses are available to put it in.
2. Users with the appropriate permission will be prompted to **Accept/Reject** the policy in its current status.
3. Once a policy is put into an approval status, users with the appropriate permission for that status are notified and asked to approve or reject it. The notification format depends on each [user's preferences](#).
4. In the policy, users can accept or reject it and may leave a comment. A comment is required when rejecting the policy.

Policy Details | Comments | Asset History | Policy History | Approval History

Consultancy

Optional comments unless you intend to reject.

Accept Reject

Category	General	Status Changed by	Claromentis Administrator
Review Date	15 April 2027		
Last Modified by	Claromentis Administrator	Author	Michael Christian
Creator	Michael Christian	Owner	Michael Christian

5. Administrators can check to see that all approvals have been given from the **Approval History** tab or the **Approval Status** button on the top right when in a policy. After which, they can move the policy to the next stage.

A reminder can be sent to those who have not yet responded from the **Approval Status** area.

6. Repeat for the next approval status until the policy is moved to **Distribution**, or back to **Draft**.

Policy Manager

Search..  All  Approved  Rejected  Not Yet Approved filter

Approved 1 Rejected 0 Not Yet Approved 6 Target Consultancy 7

Export to CSV Send reminder

Name	Status	Asset Version	Date
Claromentis Administrator	Approved	2	07-04-2026 11:57
Nigel Davies	Rejected		
Robert Reith	Rejected		
Sameer Arora	Rejected		
Demo Account	Rejected		
Jasmine Goreas	Rejected		