



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.

The screenshot shows the 'Status Details' tab in the Policy Manager admin panel. The interface includes a sidebar with navigation options: Policy permissions, Categories, Types, Status details (selected), Policy default permissions, User report permissions, and Settings. The main content area is titled 'Status details' and contains a table with the following columns: Enabled, Name*, Duration (days), and Rights Label*.

| 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 |

A 'Submit' button is located at the bottom left of the table.

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).

The screenshot shows the 'Status Details' tab in the Policy Manager admin panel, similar to Image 1 but with additional statuses. The table now includes three rows between Draft and Distribution:

| Enabled | Name* | Duration (days) | Rights Label* |
|-------------------------------------|----------------------|-----------------|----------------------|
| <input checked="" type="checkbox"/> | Draft | | n/a |
| <input checked="" type="checkbox"/> | Consultancy | | Feedback Consultancy |
| <input checked="" type="checkbox"/> | Manager Confirmation | | Manager Confirmation |
| <input checked="" type="checkbox"/> | Distribution | | n/a |
| <input type="checkbox"/> | | | |
| <input type="checkbox"/> | | n/a | n/a |

A 'Submit' button is located at the bottom left of the table.

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.

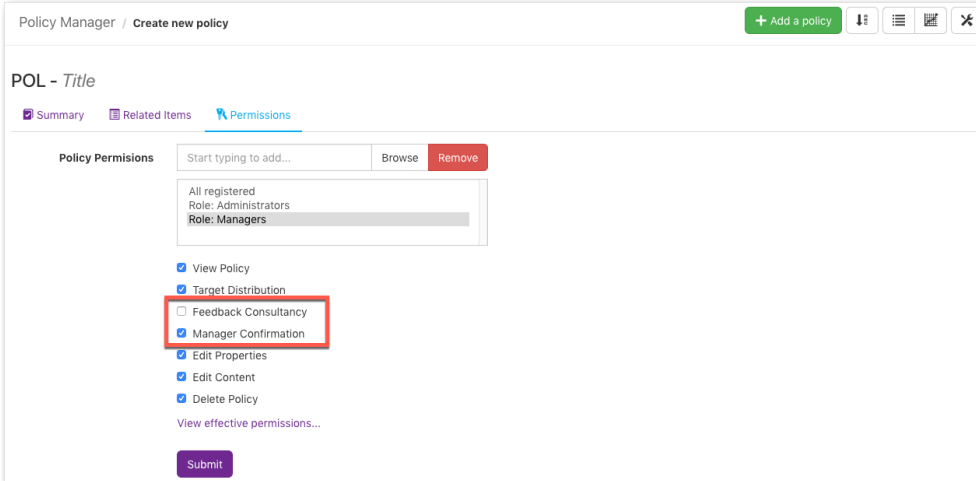


Image 3: Adjusting the permissions upon creating a new policy

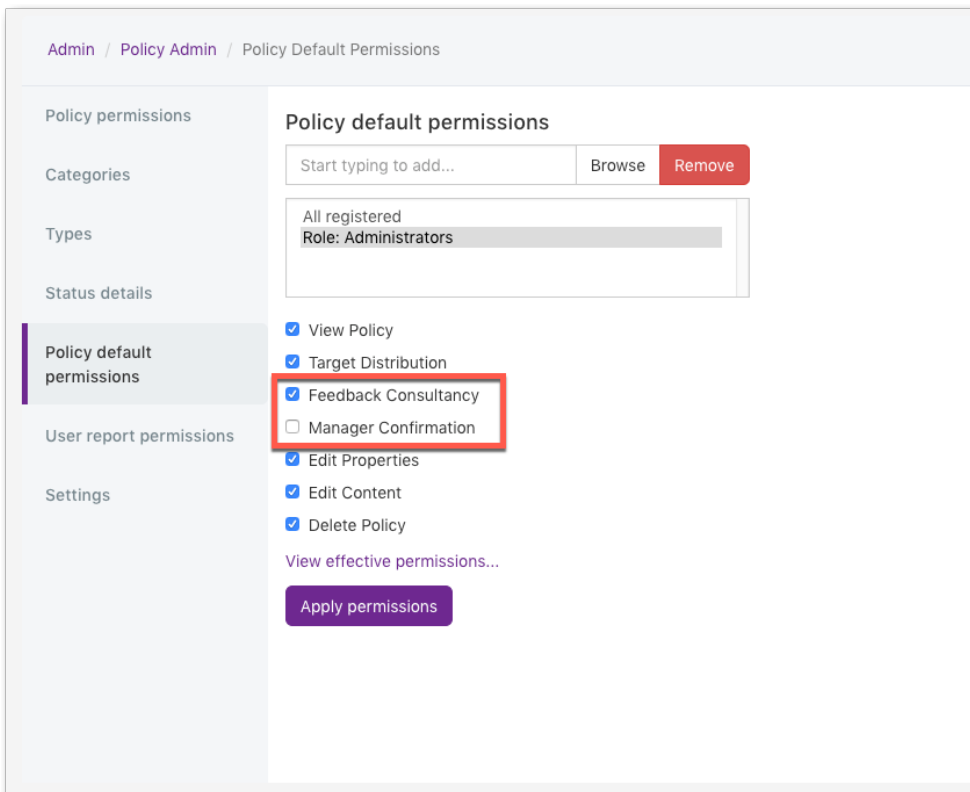


Image 4: Configuring the default permissions from the "Policy default permissions" tab in the admin

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.

Cover image

Category*

Tags

Asset Type* File upload Page File from Documents Weblink

No file chosen

STATUS Draft
 Consultancy
 Manager Confirmation
 Distribution
 Archive

Set status expiry Date

Set review 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 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.

Policy Manager / Policy Details

POL-0001 - Health and Safety

Consultancy Policy version 1 health, safety

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec fringilla, ipsum id condimentum ultrices, orci nisi ullamcorper elit, nec tincidunt neque erat et augue.

[Policy Details](#) [Comments](#) [Asset History](#) [Policy History](#) [Approval History](#)

Optional comments unless you intend to reject.

| | | | |
|-------------------------|-------------------|--------------------------|-----------------|
| Category | Health and Safety | Status Changed by | Michael Hassman |
| Review Date | 29 April 2019 | Author | |
| Last Modified by | Michael Hassman | Owner | |
| Creator | | | |

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