

Overview

When policies are close to expiring, you'll need to renew them so they are up-to-date. In this article, we will provide you with the best way to go about renewing your annual policies while retaining the older version and its acceptance history.

If you would like to find out more about the Policy manager Lifecycle, please clickhere.

How to renew a policy

When renewing a policy, we recommend using our '+ Create New Version' feature. By doing so, the old policy will be available while the new one is created.

This policy is currently live and in version 1.



As you can see here, you can edit/update the existing policy without having to re-create one from scratch. Now you can update the reference number and content as needed to reflect the revised policy.

Policy Manager		+ 1 = 2 ×
You have started the process of	creating a new version of this policy. If you wish to just edit the existing policy please click here .	
POL-0002 - Flexible	Working Policy	
Summary 🗐 Related Iter	ms Depermissions	
Ref.*	POL-0002	
Туре	Policies 🗸	
Title*	Flexible Working Policy	
Description	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec fringilla, ipsum id condimentum ultrices, orci nisl ullamcorper elit, nec tincidunt neque erat et augue.	

Cover image	Change image Delete image
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Tags	remote working, hr popular tags: intranet, claromentis, microsoft, excel, social
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STATUS	Draft V Set status expiry Date
Set review Date	
Owner*	Abigail Clark × Browse
Author*	Abigail Clark × V Browse

Please note: When creating a new version of the policy, you will see the following message indicating the new version is in the works and these edits will not affect the previous version.

Policy Manager	+ 1 = 2 ×
You have started the process of creating a new version of this policy. If you wish to just edit the existing policy please click here .	

Similarly, when viewing the older version of the policy, users will see the following message indicating that the new version is currently in progress.



Once you have finished updating the policy and hit the 'Submit' button, the policy will save as 'Draft' and record the new version. You will also be able to see the Archived (previous) versions of the policy.

This version is currently not yet live but has been moved to version 2.



Reminder: Only those with permission will be able to see the Archived policies from the front-end of the application.

To move to the next stage of your workflow, select 'Edit properties' and change the status accordingly:

Policy Manager / Policy Details	s			+ 1 = 2 ×
	POLICIES POL-0003 -	Flexible Working Pol	icy	🖍 Edit Properties
	Draft Policy version 2		Nr, remote working	Archived versions
	Lorem ipsum dolor s condimentum ultrice	it amet, consectetur adipiscing elit. D s, orci nisl ullamcorper elit, nec tincido	onec fringilla, ipsum id unt neque erat et augue.	POL-0002 - Flexible Working Policy
ld to see history				
STATUS	✓ Draft Consultation Batification	Set status	expiry Date	
Set review Date	Distribution Archive			
Owner*	Abigail Clark	× • Browse		
Author*	Abigail Clark	× • Browse		
	Submit			

Distribution stage

Now that your policy is updated and ready to go, you can move it to the last stage, also known as the Distribution status.

Before this takes place, you will be prompted with the following option to choose whether to send a notification to users (in 'Target Distribution') of the new policy or not:

Policy Manager	21 ×
Please note: The old version of this policy POL-0002-Flexible Working Policy will be automatically recalled and replaced with this one. The old policy will be available in	the version history.
 Send notification to users to read and re-accept the new version of this policy. Do not send notification Submit 	

Please note: As stated above, the old version of the policy will automatically be recalled/archived and replaced with the new one. The old policy will be available from the Policy History and the acceptance history of the prior version will also be retained (in 'Acceptance Status').

For more information on recalled policies, please click here.

Your policy is now live and will appear as such:

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net, consectetur adipiscing elit. Donec fringilla, ipsum id rci nisl ullamcorper elit, nec tincidunt neque erat et augue.	
Acceptance Status	
Archived versions	
POL-0002 - Flexible Working	g Policy
11	Pol-0002 - Flexible Workin Pol-0002 - Flexible Workin

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Last modified on 1 December 2023 by Hannah Door
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Created on 4 June 2021 by Veronica Kim Tags: policy, policy manager, user guide, renew