



Recalling Policies

Overview

If for any reason you need to recall an existing policy, you can follow the steps provided below to keep your policies organised and up-to-date.

Any recalled policies will no longer be active and users will only be able to view them.

If you are simply looking to renew an existing policy, please refer to our article [here](#).

How to recall a policy

1. To recall a policy, click into the edit properties of the policy in question.


A screenshot of the 'Policy Manager / Policy Details' interface. On the left is an illustration of travel items: a suitcase, a hat, a hot air balloon, and a plane. The main content area displays 'INSTRUCTION INS-0002 - Foreign travel advice' with sub-labels 'Distribution' and 'Policy version 1', and the text 'Travel Advice from UK Government'. On the right, there is a toolbar with icons for '+', 'undo', 'list', 'edit', and 'delete'. Below the toolbar are three green buttons: '+ Create New Version', 'Edit Properties' (which is highlighted with a red rectangle), and 'Acceptance Status'. The user 'claromentis, travel' is listed next to the policy details.

2. From the Summary tab, you will see the 'Recall this policy' option. Once you check this box, hit 'Submit'.

STATUS

Do not send notification

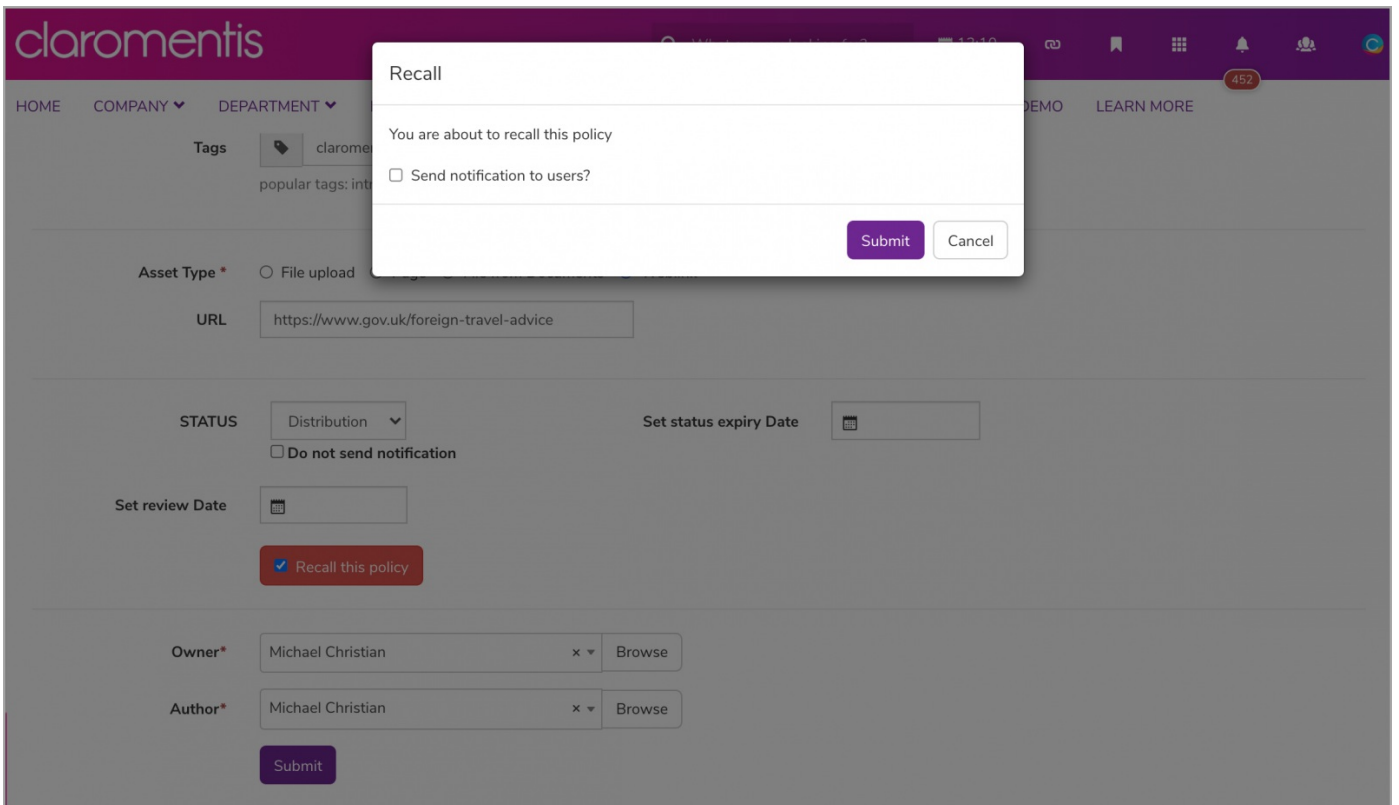
Set review Date

Recall this policy 

Owner*

Author*

3. You will be prompted with the following message where you can (1) confirm the action and (2) check the box to notify users of the recall.



Recall

You are about to recall this policy

Send notification to users?

STATUS

Do not send notification

Set review Date


Recall this policy


Owner*

Author*

4. Now you will be taken back to the front end of the policy where a message will let users know that the policy is no longer live and will be deleted/replaced.

Policy Manager / Policy Details

 This policy has been withdrawn, and eventually admin will delete it or the new version will replace it.



INSTRUCTION
INS-0002 - Foreign travel advice

Travel Advice from UK Government

claromentis, travel

Reminder: Unlike when a policy is being renewed, when one has been recalled, users will only be able to view the policy and will no longer be able to interact with it (i.e. accept policy).

Please note: As an admin, you will still be able to view the 'Acceptance History' of the policy if needed ↓

Policy Manager / Policy Details

⚠ This policy has been withdrawn, and eventually admin will delete it or the new version will replace it.

INSTRUCTION
INS-0002 - Foreign travel advice
Distribution Policy version 1 claromentis.travel

Travel Advice from UK Government

+ Create New Version
Edit Properties
Acceptance Status

How to reactivate a policy

1. You can undo a recall on a policy by simply reactivating it. To do so, uncheck the 'Recall this policy' option and press 'Submit'

STATUS Distribution Do not send notification

Set status expiry Date

Set review Date

Recall this policy

Owner* Michael Christian x Browse

Author* Michael Christian x Browse

Submit

2. You will once again be prompted with the following message where you can (1) confirm the action and (2) choose to notify users of the reactivation.

The screenshot shows the Claromentis interface with a 'Recall' dialog box open. The dialog contains the following text:

Recall

You are about to reactivate this policy

Send notification to users?

Buttons: Submit, Cancel

The background form includes the following fields and options:

- Tags: claromentis
- Asset Type: File upload, Page, File from Documents, Weblink
- URL:
- STATUS: (dropdown), Set status expiry Date:
- Do not send notification
- Set review Date:
- Recall this policy (checkbox)
- Owner*: (dropdown),
- Author*: (dropdown),
-

3. As per the Distribution status, the policy will again be live and users will be allowed to accept the policy if required.

The screenshot shows the Policy Manager interface with the following details:

Policy Manager / Policy Details

INS-0002 - Foreign travel advice

INSTRUCTION

Travel Advice from UK Government

Buttons: , ,

Please note: Reactivating a policy is not the same as renewing a policy. Reactivating a policy will only reinstate the policy to resume its original version.

Last modified on 1 December 2023 by [Hannah Door](#)

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Tags: [policy](#), [policy manager](#), [user guide](#), [recall](#)