



Policy Manager Reports

This article describes how to use the Reports Module to access dates in your Policies stored in Policy Manager.


Date Fields

There are 2 date fields that are available in policy properties - Status Expiry Date and Review Date.

Both of these dates will send a notification on that date.

When completed these dates are displayed on the Policy Details page.

Policy Manager / Policy Details



CP-001 - Claromentis Disciplinary Policy

Distribution Policy version 1
Accepted

ISO9001

The Organisation's aim is to encourage improvement in individual conduct or performance. This procedure sets out the action that will be taken when disciplinary rules are breached.

Status Expiry Date 30 November 2021 48 day(s) left

Review Date 3 January 2022

+ Create New Version

Edit Properties

Acceptance Status


Business Requirements

Often a Policy Manager Team would like to be aware of those policies that will be reaching one of these dates in the near future - so that they can plan the appropriate action with stakeholders - perhaps the policy will need a new version, or can be recalled - for example.


This can be achieved by using the Reports Module of Claromentis (not the policy manager application reports which deal with Approval and Acceptance)

Set up the Report


Head over to the Reports module and select Policies




Courses




Policy Manager



Learning

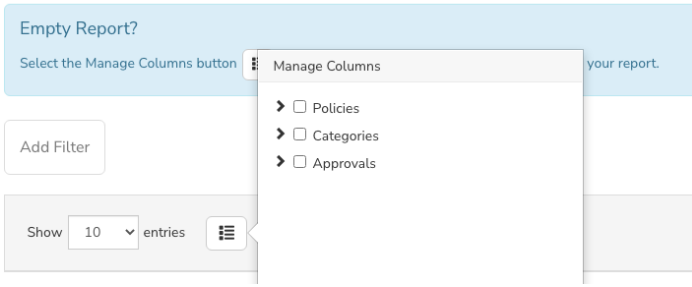


Projects

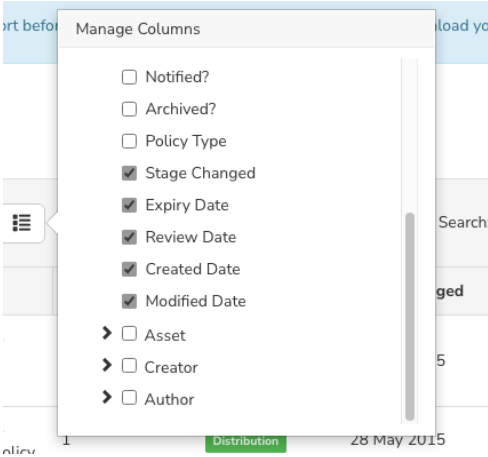


Quiz

- Create a blank report



- Manage the columns - the required date fields together with any other relevant information - normally the Policy Reference and Title.



- Save the report
- Run the report whenever required - normally it is convenient to download it as a CSV for distribution to appropriate people

Key Dates for Policies ✎

Created on 13 Oct 2021, 16:05 by Nigel Davies
 Updated on 13 Oct 2021, 16:05 by Nigel Davies

Next release is tomorrow (14 October 2021) at 11:00.
 This report is scheduled to release Weekly.

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Add Filter

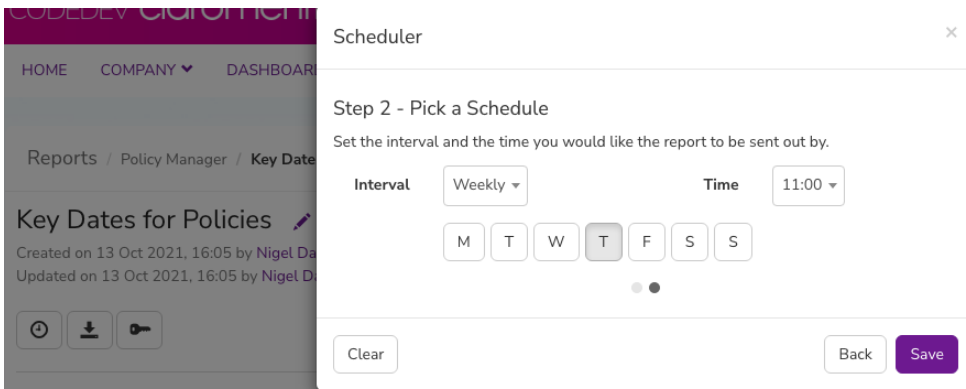
Show 10 entries

Search: Search

Reference	Title	Description	Policy Version	Policy Stage	Stage Changed	Expiry Date	Review Date	Created Date	Modified Date
CP-001	Claromentis Disciplinary Policy	The Organisation's aim is to encourage improvement in individual conduct or performance. This procedure sets out the action that will be taken when disciplinary rules are breached.	1	Distribution	28 May 2015	30 November 2021	3 January 2022	28/5/2015 09:50	13/10/2021 16:08

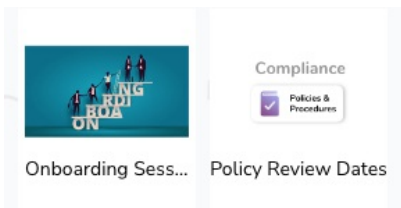
Schedule the report

Optionally you can schedule the report to run at any suitable time interval and send the results to any users required.



Add the report to a Button

As the report has a URL it is easy to add to a Button using the Buttons application, and then present that button on any page as part of a buttons Component.



Add Filters at any time

When you run the report you can easily add a filter. So if you have an extensive policy library you might find it convenient to only list those that need review in the next month.

Related Article

[How to create a new policy in Policy Manager](#)

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

Created on 13 October 2021 by [Nigel Davies](#)

Tags: [policy manager](#), [policy](#), [report](#)