

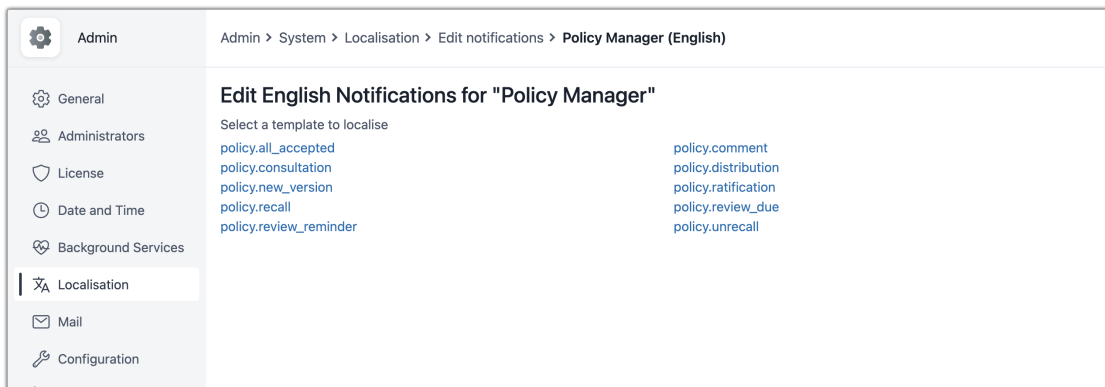
## Policy Manager Notifications

We will provide an overview of available Policy Manager notifications.

Notifications are attached to Policy Manager permissions, and there are some caveats which are explained below.

To find out more, check out our guide on [Policy Manager permissions](#).

Templates for each language can be viewed and [edited](#) from **Admin > System > Localisation > Edit templates > Policy Manager**.



### Notification not sending?

**Remember:** The type of notification received by users e.g. email, in-system, none, etc., will depend on their preferences as outlined [here](#).

If a notification is not evident, check that the recipient's preferences are correct to receive this as they would expect.

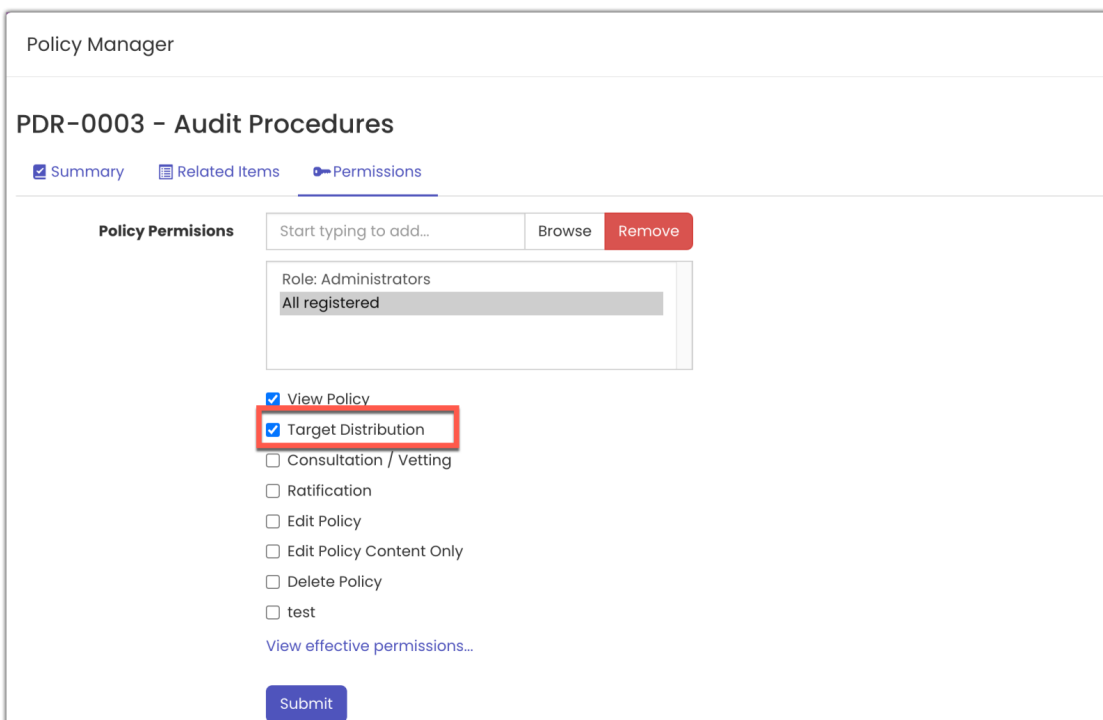
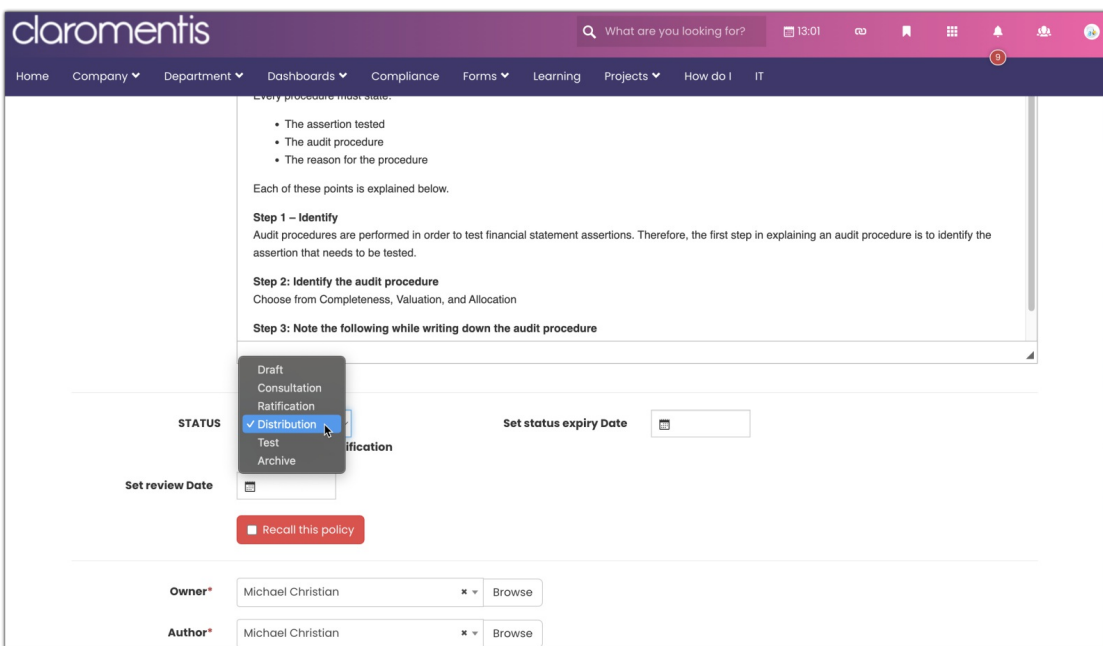
## Standard Notifications

### To accept/deny a Policy

**policy.distribution**



This notification will fire when a Policy has been put into 'Distribution' status (it has been made live), and the recipients will be users with 'Target Distribution' permission so that they can read and accept the policy.



## policy.new\_version

Admin / System / Localisation / Edit notifications / Policy Manager (English) / policy.new\_version

### Edit Notification

Editing the notification template "policy.new\_version"

**Language**  
English

**Template subject**  
1 Please Read and Accept New Version of Policy: {{ ref\_code|raw }} {{ title|raw }}

**Template Body**  
1 The policy {{ ref\_code|raw }} {{ title|raw }} has been replaced by new version. <br />  
2 <br />  
3 (Click the following link to read and accept:<br />  
4 <br />  
5 <a href="{{ new\_link }}">{{ new\_link }}</a><br />  
6 <br />  
7 <br />  
8 -----<br />  
9 This email is generated by Policy Manager Application.<br />  
10 <br />  
11

This notification will fire when a new [version has been created](#) (for an existing Policy), and the recipients will be users with 'Target Distribution' permission so that they can read and accept the new version of the Policy.

Policy Manager > Policy Details

### PROCEDURES

#### PDR-0003 - Audit Procedures

Distribution Policy version 1 Accepted Internal, audit

Audit procedures are an important area of the syllabus, though candidates often use inappropriate audit procedures to answer questions. The following tips will help you to understand the concepts and write appropriate audit procedures.

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Every procedure must state:

- The assertion tested
- The audit procedure
- The reason for the procedure

Each of these points is explained below.

**Step 1 – Identify**  
Audit procedures are performed in order to test financial statement assertions. Therefore, the first step in explaining an audit

+ Create New Version

Edit Properties

Acceptance Status

## Caveats for acceptance notifications

If you were expecting an acceptance (distribution & new version templates) notification from the Policy Manager that was not received, this is due to either:

1. The action being performed was expected to trigger an email that doesn't in reality
2. User [notification preferences](#) are set so these are not being generated in the format they expect e.g. they have preferences set to send notifications to the in-system messenger only and not email (either by default or for Policy Manager as a whole)

Use the below criteria to check that the action you are performing is expected to trigger a notification, and separately to confirm that the user expected to receive this has their preferences set correctly.

### Policy acceptance notifications will be sent to users in the target distribution:

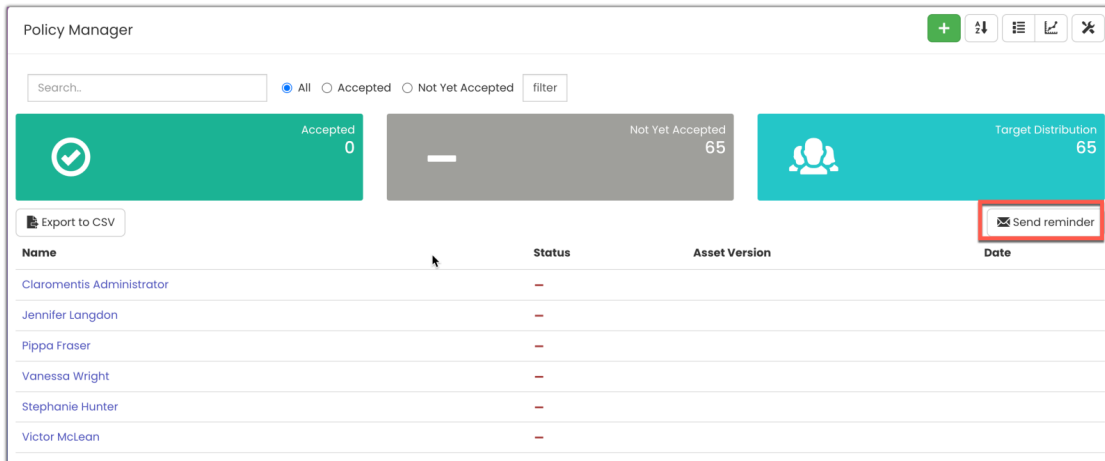
- In the format chosen in user [notification preferences](#) e.g. in system, email, both
- When a policy is put into 'distribution' status
- When a new policy version is created
- When the 'send reminder' feature is used for users who have not yet accepted the policy

### Policy acceptance notifications will not be sent:

- To users added to the target distribution in a policy that is already live (in 'Distribution')
- To the user who makes a policy live (whether for a new policy overall or a new version of an existing policy) even if they are in the 'Target Distribution'
- To the user who sends a reminder, even if they have not yet accepted the policy, they send the reminder for

## Send reminder

This feature can be used by an administrator (with 'edit policy' rights) to send the distribution email template to any users who have not yet accepted the policy.



The screenshot shows the 'Policy Manager' interface. At the top, there are three summary cards: 'Accepted' with a count of 0, 'Not Yet Accepted' with a count of 65, and 'Target Distribution' with a count of 65. Below these cards is a table with columns for 'Name', 'Status', 'Asset Version', and 'Date'. The table lists several users: Claromentis Administrator, Jennifer Langdon, Pippa Fraser, Vanessa Wright, Stephanie Hunter, and Victor McLean. A 'Send reminder' button is highlighted with a red box in the top right corner of the table area.

## To recall a Policy

### policy.recall

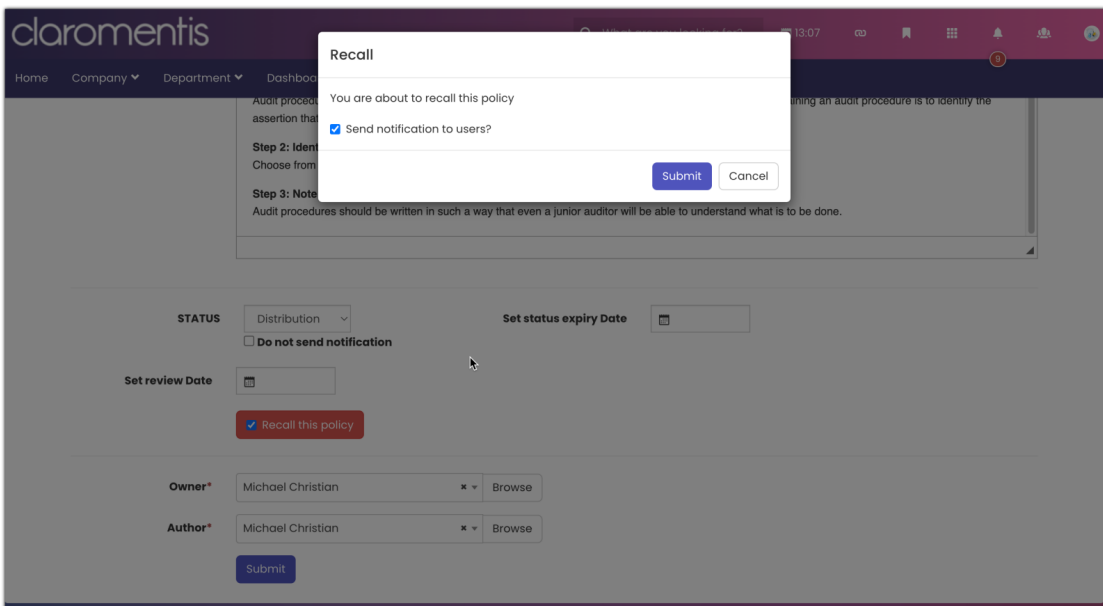
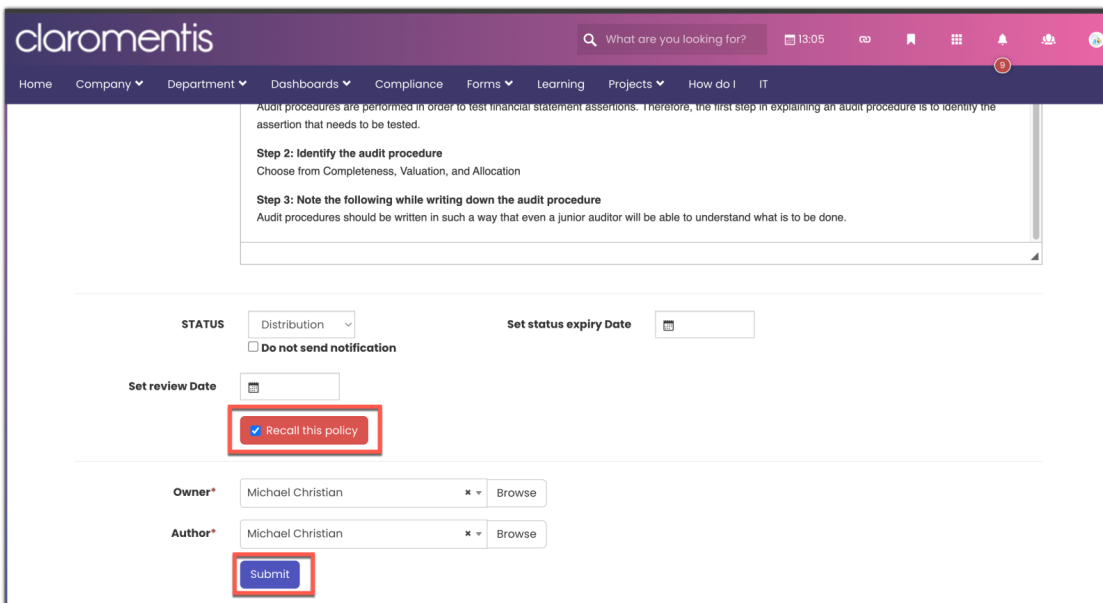


The screenshot shows the 'Edit Notification' interface for the 'policy.recall' notification template. The interface includes a sidebar with navigation options like 'General', 'Administrators', 'License', 'Date and Time', 'Background Services', 'Localisation', 'Mail', 'Configuration', 'Labs', 'Integrations', and 'Scripts'. The main content area shows the 'Language' set to 'English', the 'Template subject' as 'The following policy has been withdrawn, and eventually the admin will delete it or', and the 'Template Body' as a multi-line HTML template with various placeholders like {{ ref\_code }}, {{ title }}, {{ description }}, {{ creator }}, {{ owner }}, and {{ category }}.

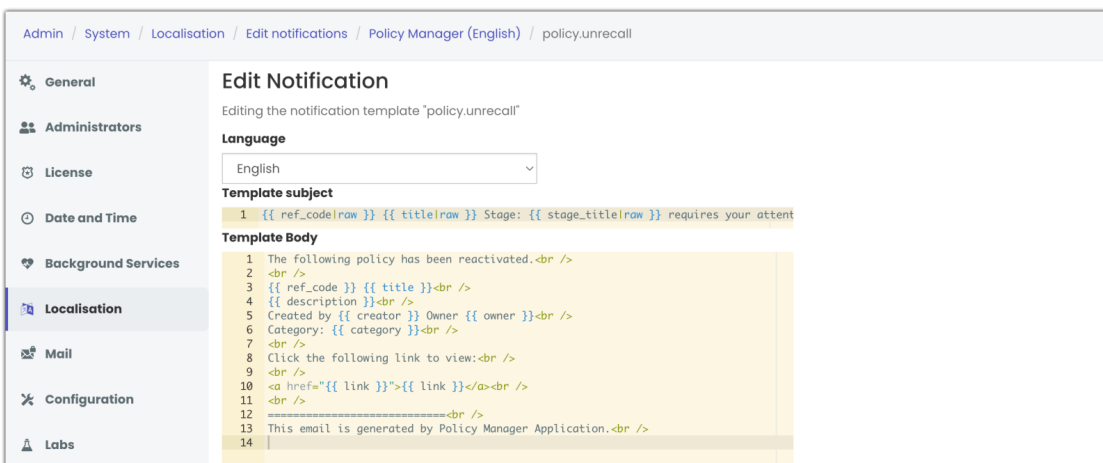
This notification will fire when a Policy is put into 'Recall', status.

A pop-up will appear to allow the administrator to choose whether to send a notification or not.

If this is chosen, the notification will be sent to all users in the 'Target Distribution' permission.

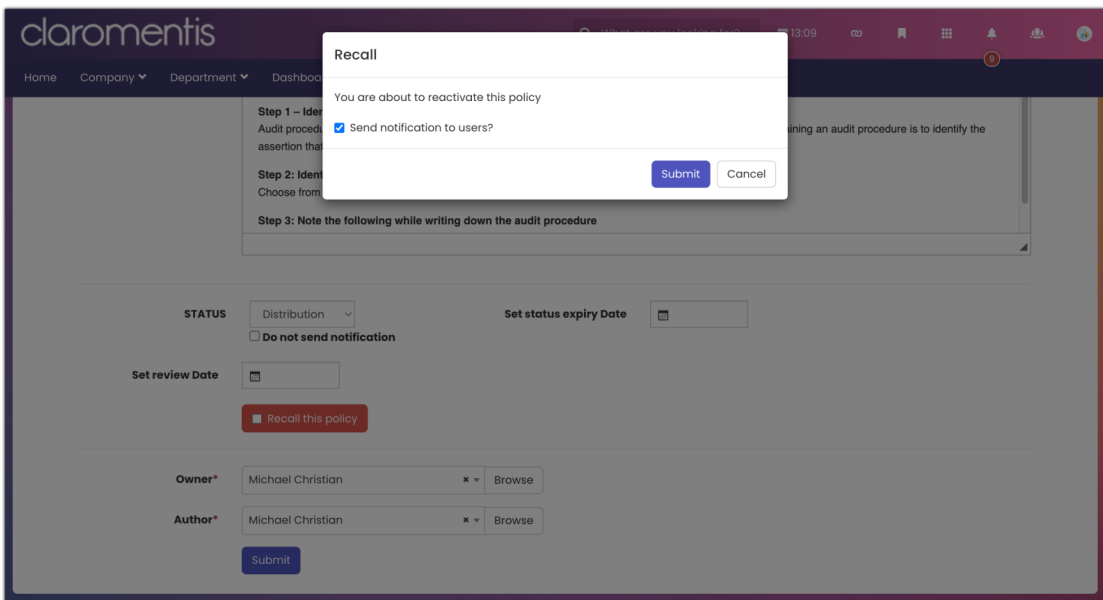


## policy.unrecall



This notification will fire when a Policy is reactivated (when it was [previously recalled](#)), and a pop-up will appear to allow the administrator to choose whether to send a notification about this or not.

If this is chosen, the notification will be sent to all users in the ['Target Distribution' permission](#).

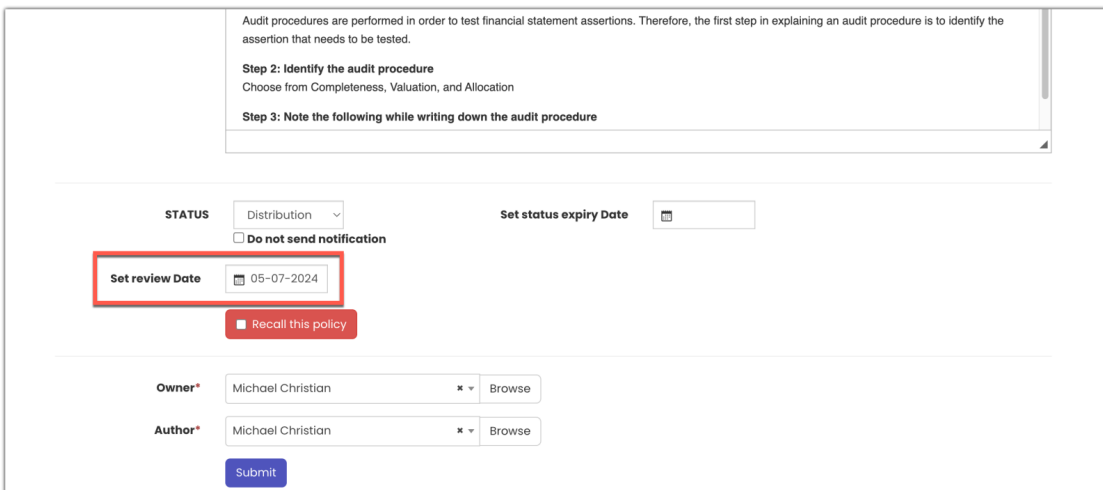


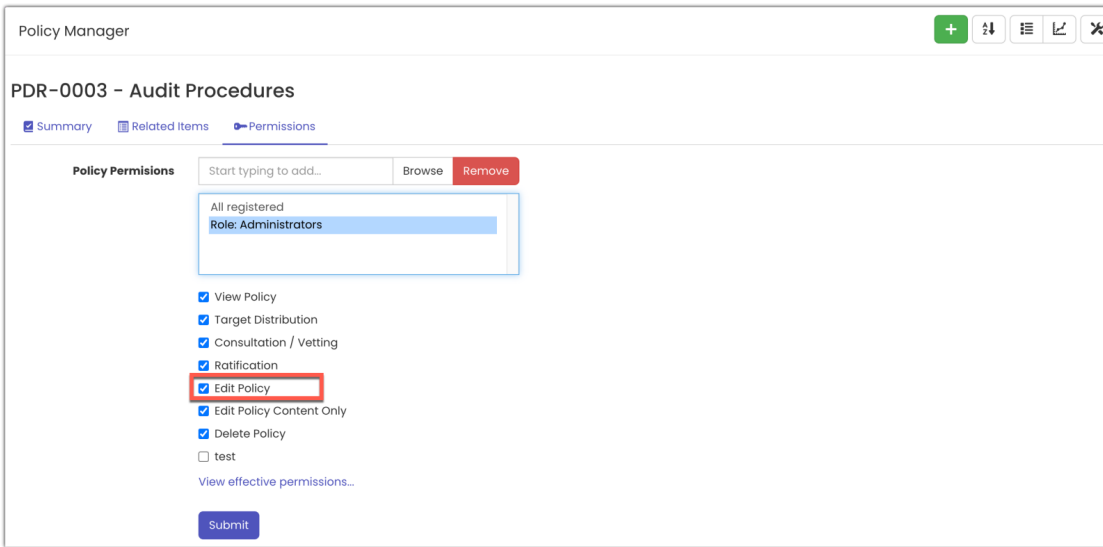
### If a review date has been set on a Policy

policy.review\_reminder



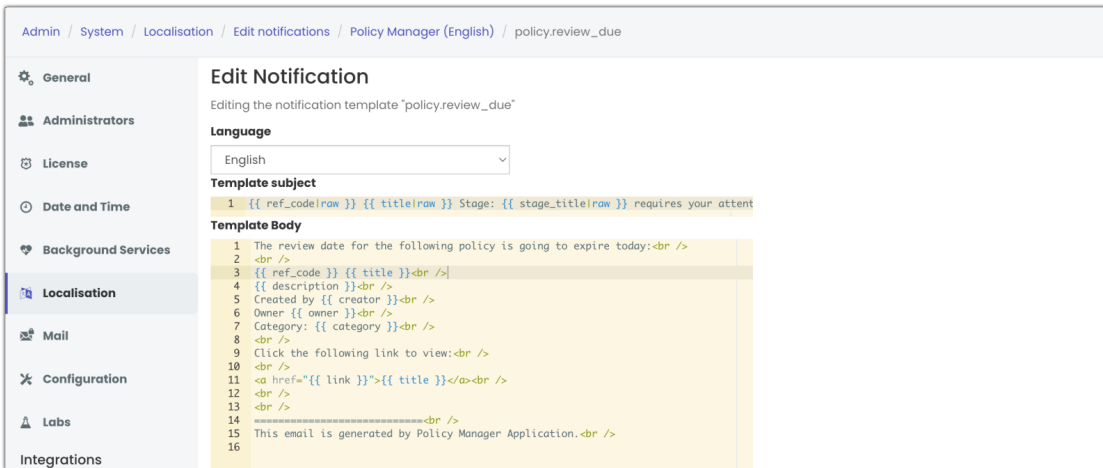
This notification will fire 15 days before the entered review date and will be received by users with the 'Edit Policy' permission to the Policy so they can action this.





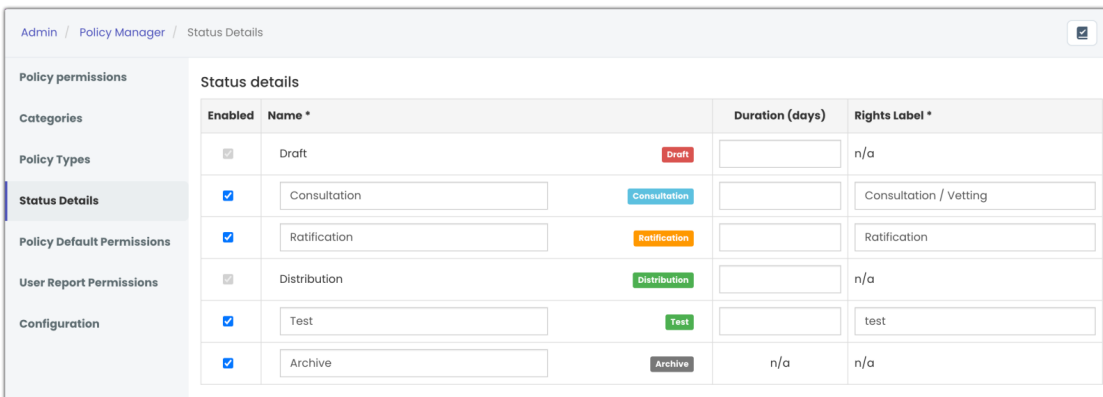
### policy.review\_due

This notification will fire on the day the entered review date is met and will be received by users with the 'Edit Policy' permission to the Policy so they can action this.



## If your team set up an approval process in Policy Manager

There will be extra statuses in use that make up the [approval process](#) (created in Admin > Policy Manager > Statuses)



This is an optional feature, as your team may not require an approval process, in which case the standard 'Draft' and 'Distribution' statuses alone can be used.

The notification template names will not update, but will correspond to the status order you have created and will pull through the custom phrasing.

## policy.consultation

The screenshot shows the 'Edit Notification' interface for the 'policy.consultation' template. The breadcrumb path is 'Admin / System / Localisation / Edit notifications / Policy Manager (English) / policy.consultation'. The left sidebar includes 'General', 'Administrators', 'License', 'Date and Time', 'Background Services', 'Localisation', 'Mail', 'Configuration', 'Labs', and 'Integrations'. The main content area is titled 'Edit Notification' and shows the following details:

- Language:** English
- Template subject:** `1 {{ ref_code|raw }} {{ title|raw }} Stage: {{ stage_title|raw }} requires your attent`
- Template Body:**

```
1 The following policy has been {% if is_new_policy %} created {% else %} edited and/  
2 -br />  
3 {{ ref_code }} {{ title }}-br />  
4 {{ description }}-br />  
5 Created by {{ creator }}-br />  
6 Owner {{ owner }}-br />  
7 Category: {{ category }}-br />  
8 -br />  
9 Click the following link to view:-br />  
10 -br />  
11 <a href="{{ link }}">{{ link }}</a>-br />  
12 -br />  
13 This stage will be expired on {{ expiry_date }}-br />  
14 -br />  
15 -----br />  
16 This email is generated by Policy Manager Application.-br />  
17
```

This notification will fire when a Policy has been put into the second status when in use and will be sent to user(s) with permission to that status of the [approval process](#) so they can approve/reject the policy.

This status can be renamed, and if it has the notification and selection when editing policies will reflect your title and not 'Consultation' which is the default.

The screenshot shows the 'policy.consultation' form in the Claromentis system. The breadcrumb path is 'Home / Company / Department / Dashboards / Compliance / Forms / Learning / Projects / How do I / IT'. The main content area is titled 'Step 1 - Identify' and contains the following steps:

- Step 1 - Identify:** Audit procedures are performed in order to test financial statement assertions. Therefore, the first step in explaining an audit procedure is to identify the assertion that needs to be tested.
- Step 2: Identify the audit procedure:** Choose from Completeness, Valuation, and Allocation
- Step 3: Note the following while writing down the audit procedure**

The form includes the following fields and controls:

- STATUS:** A dropdown menu with options: Draft, Consultation (selected), Ratification, Distribution, Test, Archive.
- Set review Date:** A date input field.
- Set status expiry Date:** A date input field.
- Owner\*:** A dropdown menu with 'Michael Christian' selected and a 'Browse' button.
- Author\*:** A dropdown menu with 'Michael Christian' selected and a 'Browse' button.
- Recall this policy:** A red button.
- Submit:** A blue button.

## policy.comment

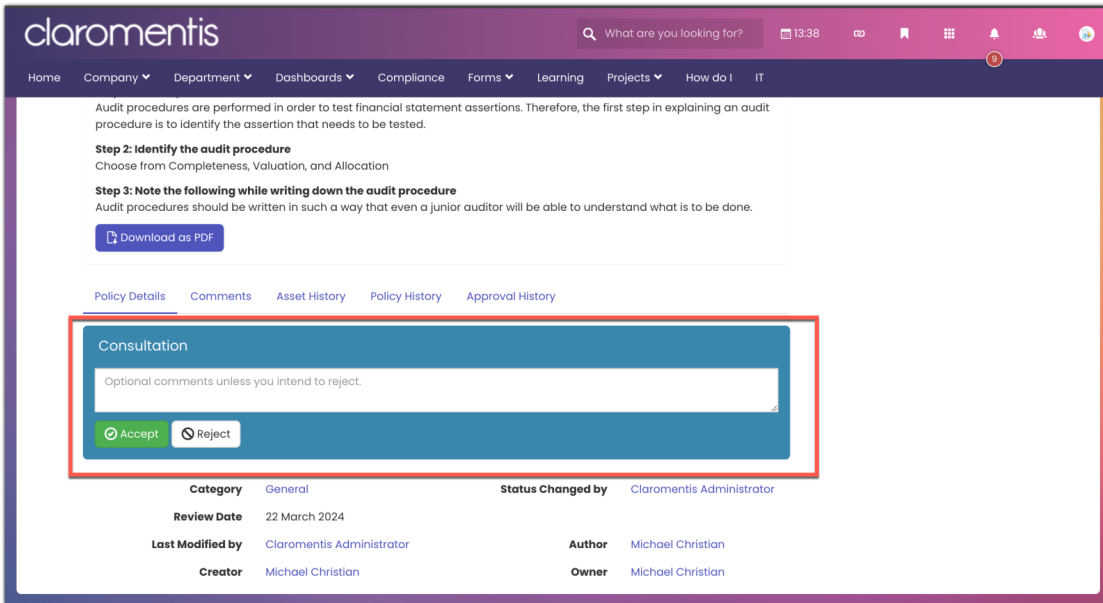
The screenshot shows the 'Edit Notification' interface for the 'policy.comment' template. The breadcrumb path is 'Admin / System / Localisation / Edit notifications / Policy Manager (English) / policy.comment'. The left sidebar includes 'General', 'Administrators', 'License', 'Date and Time', 'Background Services', 'Localisation', 'Mail', 'Configuration', 'Labs', and 'Integrations'. The main content area is titled 'Edit Notification' and shows the following details:

- Language:** English
- Template subject:** `1 {{ commented_by|raw }} made a comment in Policy: {{ ref_code|raw }} - {{ title|raw }}`
- Template Body:**

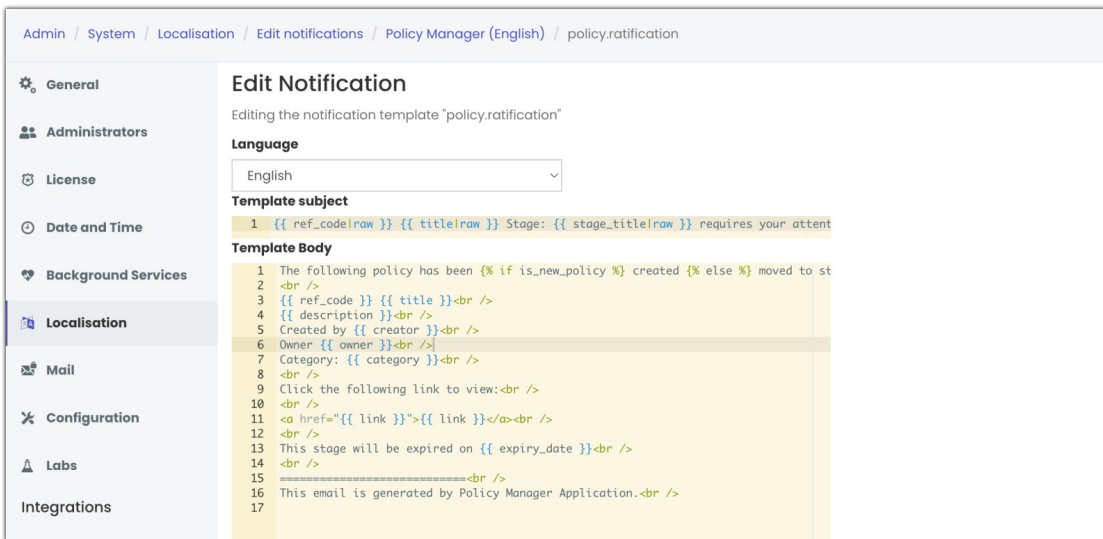
```
1 {{ commented_by|raw }} made a comment in Policy: {{ ref_code }} - {{ title }}-br />  
2 -br />  
3 Policy approval by comment: {{ approval_status }}-br />  
4 Comment:-br />  
5 {{ comment_msg }}-br />  
6 -br />  
7 Policy Stage: {{ stage_title }}-br />  
8 -br />  
9 <a href="{{ link }}">{{ link }}</a>-br />  
10 -br />  
11 -----br />  
12 This email is generated by Policy Manager Application.
```

This notification will fire when a comment is added to a Policy that is in a status that requires approval.

Recipient(s) will be the user(s) with permission to that status of the [approval process](#) when approving/rejecting the policy.



### policy.ratification



This notification will fire when a Policy has been put into the third status space available and will be sent to the user(s) with permission to that status of the [approval process](#) when approving/rejecting the policy.

This status can be renamed, and if it has the notification will reflect this title and not 'Ratification', which is the default.

claromentis

What are you looking for? 13:40

Home Company Department Dashboards Compliance Forms Learning Projects How do I IT

Each of these points is explained below.

**Step 1 – Identify**  
Audit procedures are performed in order to test financial statement assertions. Therefore, the first step in explaining an audit procedure is to identify the assertion that needs to be tested.

**Step 2: Identify the audit procedure**  
Choose from Completeness, Valuation, and Allocation

**Step 3: Note the following while writing down the audit procedure**

**STATUS**  **Set status expiry Date**

- Draft
- Consultation
- Ratification
- Distribution
- Test
- Archive

**Set review Date**

**Owner\*** Michael Christian  Browse

**Author\*** Michael Christian  Browse

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Tags: notification, policy, policy manager