



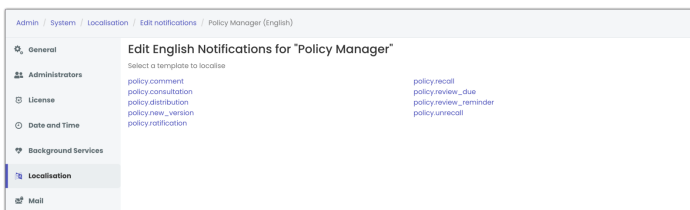
## Policy Manager Notifications

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 how 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.

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What are you looking for?

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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**

Draft  
Consultation  
Ratification  
**Distribution**  
Test  
Archive

STATUS

Set review Date

Set status expiry Date

Record this policy

Owner\* Michael Christian Browse

Author\* Michael Christian Browse

Policy Manager

PDR-0003 - Audit Procedures

Summary Related Items Permissions

Policy Permissions

Start typing to add... Browse Remove

Role: Administrators  
All registered

☒ View Policy

☒ Target Distribution

☐ Consultation / Vetting

☐ Ratification

☐ Edit Policy

☐ Edit Policy Content Only

☐ Delete Policy

☐ test

View effective permissions...

Submit

**Please note:** The user that moves the policy into distribution status will NOT receive a notification even if they are in 'target distribution' permission.

## Send reminder

This feature can be used by an administrator to send the distribution email template to any users who have not yet accepted the policy.

Policy Manager

Search...

All Accepted Not Yet Accepted Filter

Accepted 0 Not Yet Accepted 65 Target Distribution 65

Export to CSV

Name Status Asset Version Date

Claramentis Administrator - - -

Jennifer Langdon - - -

Pippa Fraser - - -

Vanessa Wright - - -

Stephanie Hunter - - -

Victor McClean - - -

Send reminder

## policy.new\_version

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

General

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Edit Notification

Editing the notification template "policy.new\_version"

Language English

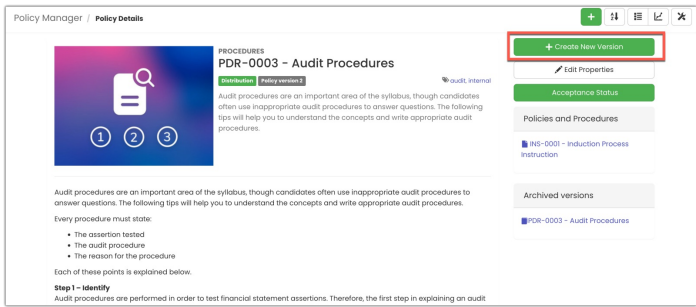
Template subject

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 Policy version has been uploaded (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.



**Please note:** The user that creates the new policy version will NOT receive a notification even if they are in 'target distribution' permission.

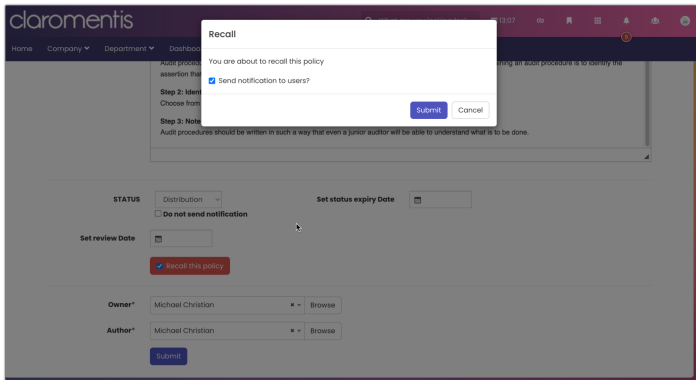
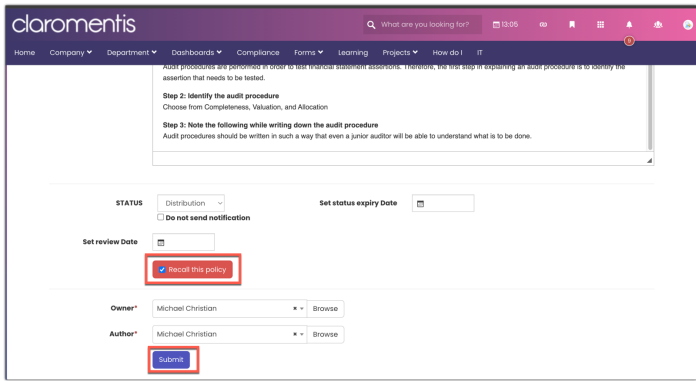
## To recall a Policy

### policy.recall

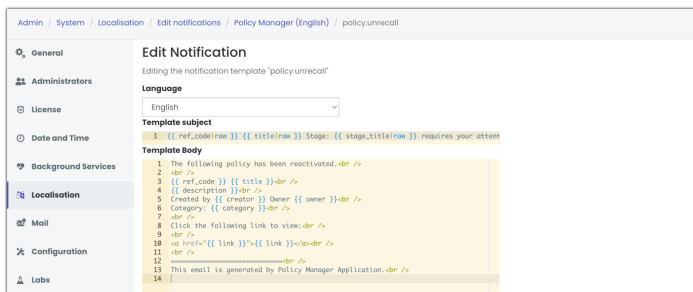


This notification will fire when a Policy is put into 'Recall', a pop-up will appear to allow the administrator to choose whether to send a notification or not.

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



### policy.unrecall



Admin / System / Localisation / Edit notifications / Policy Manager (English) / policy/review\_reminder

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Edit Notification

Editing the notification template "policy\_review\_reminder"

Language

English

Template subject

[[ ref\_code ]], [[ title ]], Stage: [[ stage\_title ]], requires your attention

Template Body

1 The review date for the following policy is going to expire in [[ days\_left ]] days

2 <br />

3 [[ ref\_code ]], [[ title ]]

4 [[ description ]]

5 Created by [[ creator ]]

6 Owner [[ owner ]]

7 Category: [[ category ]]

8 <br />

9 Click the following link to view:

10 <br />

11 <a href="[[ link ]]">[[ title ]]</a>

12 <br />

13 <br />

14 This email is generated by Policy Manager Application.

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.

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

Distribution

Set status expiry Date

Do not send notification

Set review Date

05-07-2024

Recall this policy

Owner\*

Michael Christian

Browse

Author\*

Michael Christian

Browse

Submit

Policy Manager

+

⌵

⌵

⌵

⌵

⌵

PDR-0003 - Audit Procedures

Summary

Related Items

Permissions

Policy Permissions

Start typing to add...

Browse

Remove

All registered

Role Administrators

View Policy

Target Distribution

Consultation / Vetting

Ratification

Edit Policy

Edit Policy Content Only

Delete Policy

test

View effective permissions...

Submit

policy.review\_due

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

Admin / System / Localisation / Edit notifications / Policy Manager (English) / policy/review\_due

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Edit Notification

Editing the notification template "policy\_review\_due"

Language

English

Template subject

[[ ref\_code ]], [[ title ]], Stage: [[ stage\_title ]], requires your attention

Template Body

1 The review date for the following policy is going to expire today:

2 <br />

3 [[ ref\_code ]], [[ title ]]

4 [[ description ]]

5 Created by [[ creator ]]

6 Owner [[ owner ]]

7 Category: [[ category ]]

8 <br />

9 Click the following link to view:

10 <br />

11 <a href="[[ link ]]">[[ title ]]</a>

12 <br />

13 <br />

14 <br />

15 This email is generated by Policy Manager Application.

16

If your team set up an approval process in Policy Manager

The labels of statuses Policies can move through can be renamed as well as one extra status (between 'Distribution' and 'Archive') included if required.

If renamed or made active, the label will update in the permissions box to the new title.

The notifications for each status work the same and will have the updated title showing in them when received (if changed from the default title)

The statuses can be edited from Admin > Policy Manager > Statuses:

Admin / Policy Manager / Status Details

Policy permissions

Categories

Policy Types

Status Details

Policy Default Permissions

User Report Permissions

Configuration

Status details

Enabled	Name *	Duration (days)	Rights Label *
<input type="checkbox"/>	Draft	<div>Draft</div>	n/a
<input checked="" type="checkbox"/>	Consultation	<div>Consultation</div>	Consultation / Vetting
<input checked="" type="checkbox"/>	Refutation	<div>Refutation</div>	Refutation
<input type="checkbox"/>	Distribution	<div>Distribution</div>	n/a
<input checked="" type="checkbox"/>	Test	<div>Test</div>	test
<input checked="" type="checkbox"/>	Archive	<div>Archive</div>	n/a

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.

policy.consultation

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Edit Notification

Editing the notification template 'policy.consultation'

Language

English

Template subject

1. {{ ref\_code\_row }} {{ title\_row }} Stage: {{ stage\_title\_row }} requires your attention

Template Body

1. The following policy has been {{ if is\_new\_policy }} created {{ else }} edited and/  
2. {{ ref\_code }} {{ title }}-dr />  
3. {{ description }}-dr />  
4. Created by {{ creator }}-dr />  
5. Owner {{ owner }}-dr />  
6. Category: {{ category }}-dr />  
7. {{ click the following link to view-dr />  
8. {{ link }}-dr />  
9. This stage will be expired on {{ expiry\_date }}-dr />  
10. This email is generated by Policy Manager Application-dr />

This notification will fire when a Policy has been put into 'Consultation' status and will be sent to user(s) with permission to that status of theapproval process so they can approve/reject the policy.

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

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What are you looking for?

13:36

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How do I?

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

Draft

Consultation

Refutation

Distribution

Test

Archive

Set status expiry Date

Set review Date

Owner\*

Michael Christian

Browse

Author\*

Michael Christian

Browse

Submit

policy.comment

Admin / System / Localisation / Edit notifications / Policy Manager (English) / policy.comment

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Edit Notification

Editing the notification template 'policy.comment'

Language

English

Template subject

1. {{ commented\_by\_row }} made a comment in Policy: {{ ref\_code\_row }} - {{ title\_row }}

Template Body

1. {{ commented\_by\_row }} made a comment in Policy: {{ ref\_code }} - {{ title }}-dr />  
2. {{ ref\_code }} {{ title }}-dr />  
3. Policy approval by comment: {{ approval\_status }}-dr />  
4. Comment-dr />  
5. {{ comment\_msg }}-dr />  
6. {{ ref\_code }} {{ title }}-dr />  
7. Policy Stage: {{ stage\_title }}-dr />  
8. {{ link }}-dr />  
9. This email is generated by Policy Manager Application-dr />

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 theapproval process when approving/rejecting the policy.

[illegible]

**policy.ratification**

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

[illegible]