



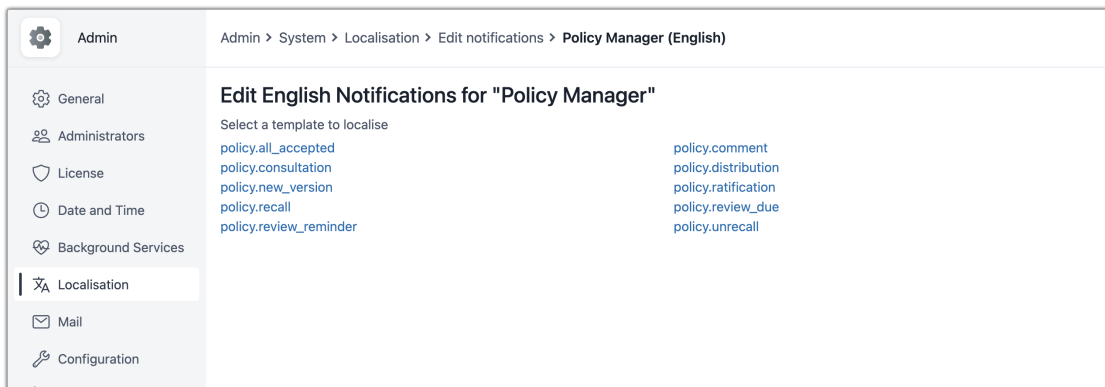
## Policy Manager Notifications

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**

Admin > System > Localisation > Edit notifications > Policy Manager (English) > **policy.distribution**

### Edit Notification

Editing the notification template "policy.distribution"

Language: English

Template subject: 1 Please Read and Accept Policy: {{ ref\_code|raw }} {{ title|raw }} Stage: {{

Template Body:

```

1 The following policy has been {% if is_new_policy %} created {% else %} m
2 <br />
3 Please read and accept the following policy:<br />
4 <br />
5 {{ ref_code }} {{ title }}<br />
6 {{ description }}<br />
7 Created by {{ creator }}<br />
8 Owner {{ owner }}<br />
9 Category: {{ category }}<br />
10 <br />
11 Click the following link to read and accept:<br />
12 <br />
13 <a href="{{ link }}">{{ link }}</a><br />
14 <br />
15 <br />
16 =====<br />
17 This email is generated by Policy Manager Application.<br />
18

```

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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Ask anything 14:53

- To integrate sustainability considerations into all our business decisions
- To ensure that all staff are fully aware of our Sustainability Policy and are committed to implementing and improving it
- To minimise the impact on the sustainability of all office and transportation activities
- To make clients and suppliers aware of our Sustainability Policy, and encourage them to adopt sound sustainable management practices
- Continually strive to improve our sustainability performance

Draft  
 Consultancy  
 Manager confirmation  
 **Distribution**

STATUS

Do not send notification

Set status expiry Date

Set review Date: 23-05-2027

**Recall this policy**

Owner\*: Michael Christian x Browse

Author\*: Michael Christian x Browse

Policy Manager

### POL-0003 - Sustainability Policy

Summary Related Items Permissions

Policy permissions: Start typing to add... Browse Remove

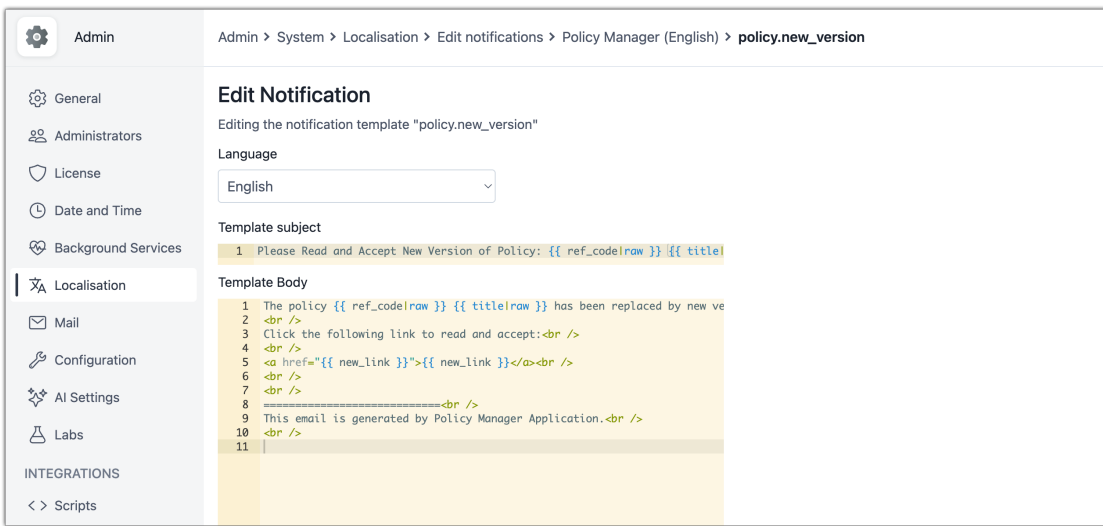
All registered  
 Role: Administrators

**View Policy**  
 **Target Distribution**

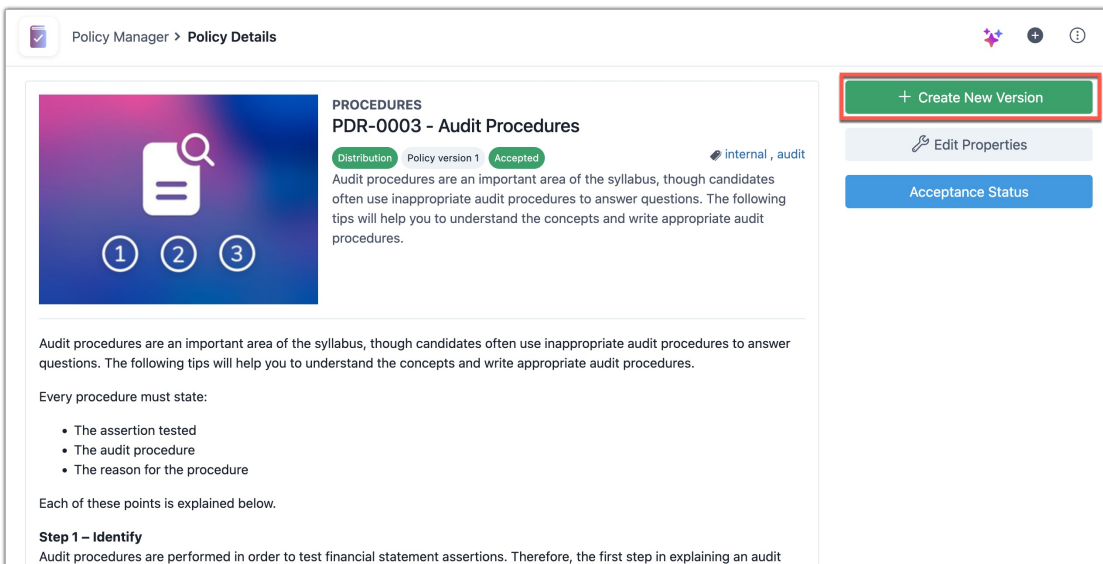
Consultancy  
 Manager confirmation  
 Edit Policy  
 Edit Policy Content Only  
 Delete Policy

View effective permissions...

Submit



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.



## 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 is a search bar and filter options: 'All' (selected), 'Accepted', and 'Not Yet Accepted'. Below the filters are three summary cards: 'Accepted' with a count of 0, 'Not Yet Accepted' with a count of 61, and 'Target Distribution' with a count of 61. There are buttons for 'Export to CSV' and 'Send reminder'. Below these is a table with columns: Name, Status, Asset Version, and Date. The table lists several users, all with a status of 'Not Yet Accepted' (indicated by a red minus sign icon).

Name	Status	Asset Version	Date
Ciaromantis Administrator	⊖		
Pippa Fraser	⊖		
Vanessa Wright	⊖		
Stephanie Hunter	⊖		
Victor McLean	⊖		
Jason Reid	⊖		

### To recall a Policy

#### policy.recall

The screenshot shows the 'Admin' interface for editing the 'policy.recall' notification template. The breadcrumb trail is: Admin > System > Localisation > Edit notifications > Policy Manager (English) > policy.recall. The main content area is titled 'Edit Notification' and shows the configuration for the notification template. The 'Language' is set to 'English'. The 'Template subject' is: `1 {{ ref_code|raw }} {{ title|raw }} Stage: {{ stage_title|raw }} requires y`. The 'Template Body' contains HTML code for the notification email, including a link to view the policy and a footer: `14 This email is generated by Policy Manager Application.`

This notification will fire when a Policy is put into 'Recall', status and if the editor chooses for it to be sent in the pop-up that appears when recalling.

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

claromentis Ask anything 14:55 15

- To integrate sustainability considerations into all our business decisions
- To ensure that all staff are fully aware of our Sustainability Policy and are committed to implementing and improving it
- To minimise the impact on the sustainability of all office and transportation activities
- To make clients and suppliers aware of our Sustainability Policy, and encourage them to adopt sound sustainable management practices
- Continually strive to improve our sustainability performance

STATUS: Distribution

Do not send notification

Set status expiry Date:

Set review Date: 23-05-2027

Recall this policy

Owner\*: Michael Christian

Author\*: Michael Christian

claromentis 14:56 15

**Recall**

You are about to recall this policy

Send notification to users?

STATUS: Distribution

Do not send notification

Set status expiry Date:

Set review Date: 23-05-2027

Recall this policy

Owner\*: Michael Christian

## policy.unrecall

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

**General**

**Administrators**

**License**

**Date and Time**

**Background Services**

**Localisation**

**Mail**

**Configuration**

**Labs**

### Edit Notification

Editing the notification template "policy.unrecall"

**Language**  
English

**Template subject**

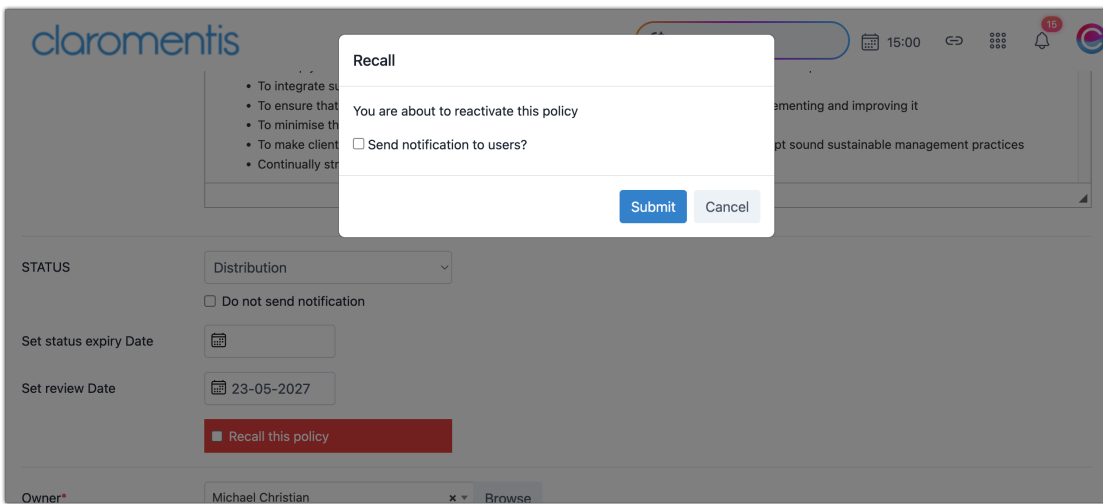
```
1 {{ ref_code|raw }} {{ title|raw }} Stage: {{ stage_title|raw }} requires your attent
```

**Template Body**

```
1 The following policy has been reactivated.<br />
2 <br />
3 {{ ref_code }} {{ title }}<br />
4 {{ description }}<br />
5 Created by {{ creator }} Owner {{ owner }}<br />
6 Category: {{ category }}<br />
7 <br />
8 Click the following link to view:<br />
9 <br />
10 <a href="{{ link }}">{{ link }}</a><br />
11 <br />
12 =====<br />
13 This email is generated by Policy Manager Application.<br />
14
```

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.

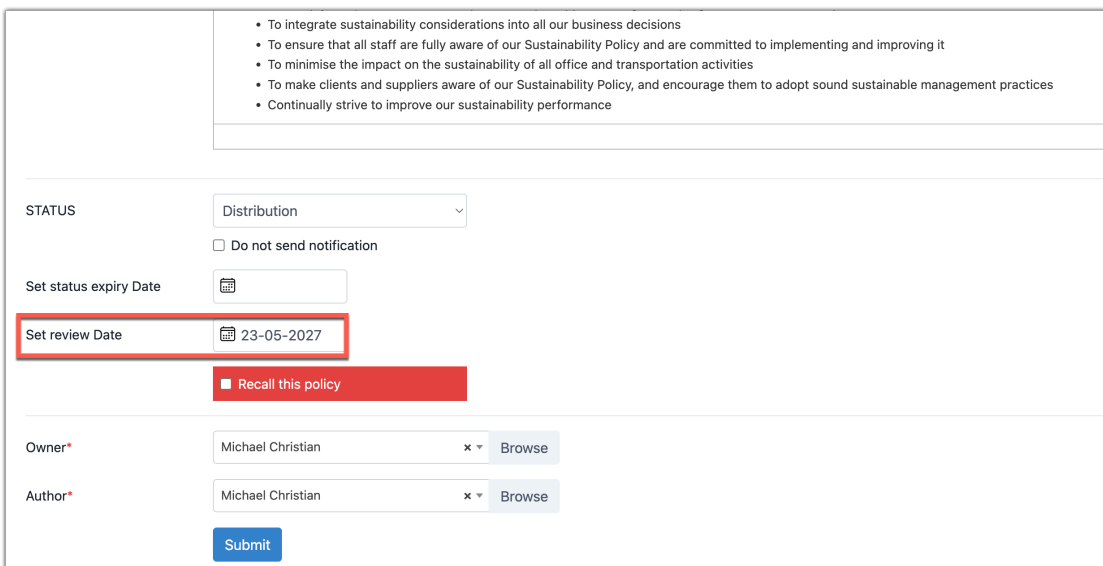


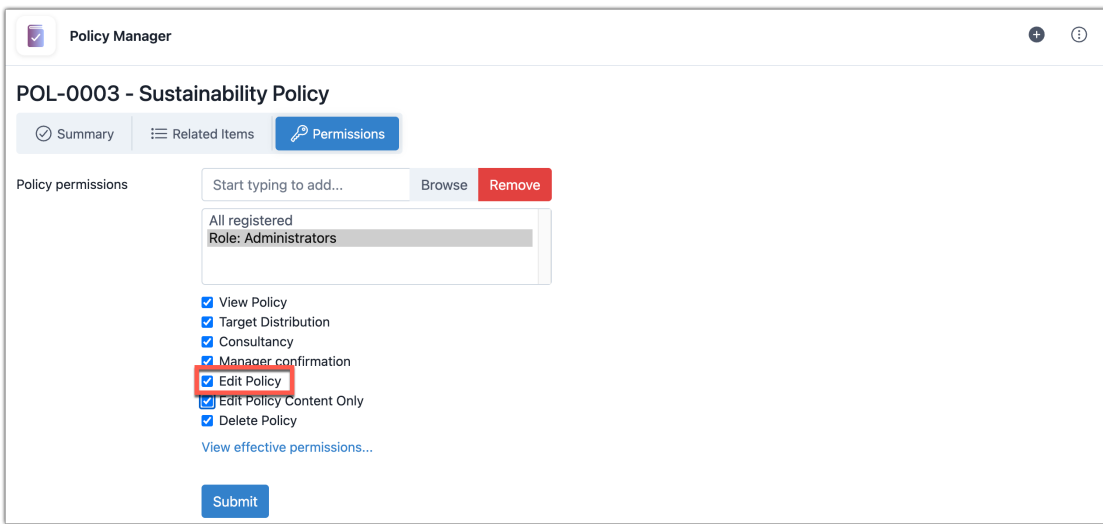
**If a review date has been set on a Policy**

**policy.review\_reminder**



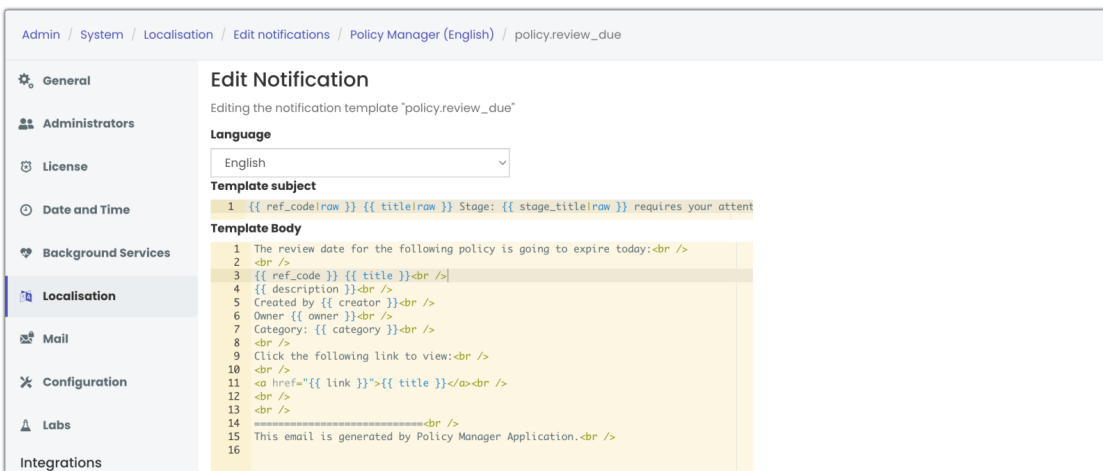
This notification will fire 15 days before the entered review date and will be received by users with the 'Edit Policy' permission to the Policy so they can action this.





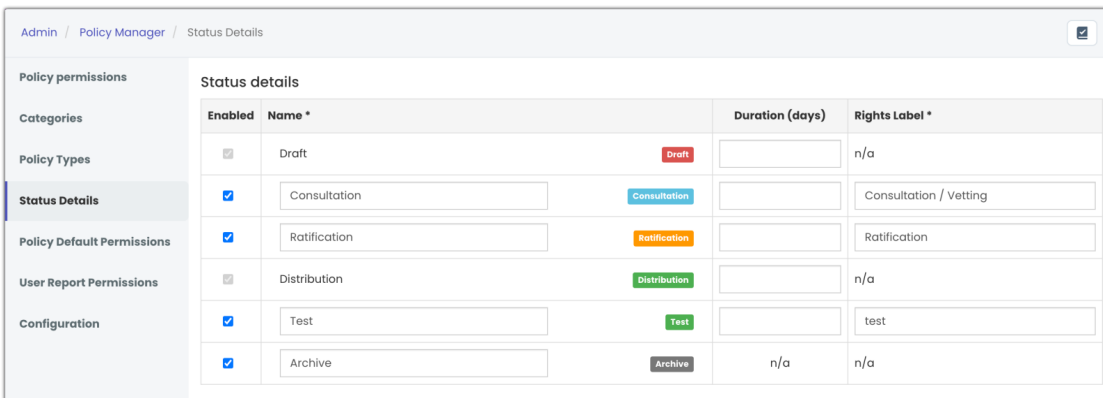
### policy.review\_due

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

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

### Edit Notification

Editing the notification template "policy.consultation"

**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.

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What are you looking for? 13.36

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**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  
Ratification  
Distribution  
Test  
Archive

**Set review Date**

**Set status expiry Date**

**Owner\*** Michael Christian x Browse

**Author\*** Michael Christian x Browse

Submit

Recall this policy

## policy.comment

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

### Edit Notification

Editing the notification template "policy.comment"

**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.

The screenshot shows the Claromentis web application interface. At the top, there is a navigation bar with the logo and a search bar. Below the navigation bar, there are several tabs: Policy Details, Comments, Asset History, Policy History, and Approval History. The main content area displays a consultation form with a text input field and two buttons: 'Accept' and 'Reject'. Below the form, there is a table of metadata:

Category	General	Status Changed by	Claromentis Administrator
Review Date	22 March 2024		
Last Modified by	Claromentis Administrator	Author	Michael Christian
Creator	Michael Christian	Owner	Michael Christian

## policy.ratification

The screenshot shows the 'Edit Notification' configuration page in the Policy Manager (English) / policy.ratification section. The page is titled 'Edit Notification' and shows the configuration for the notification template 'policy.ratification'. The configuration includes a language dropdown set to 'English', a template subject, and a template body. The template body is a code block containing the following HTML and text:

```
1 {{ ref_code|raw }} {{ title|raw }} Stage: {{ stage_title|raw }} requires your attent
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 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

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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**

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

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

**Set review Date**

**Owner\*** Michael Christian  x Browse

**Author\*** Michael Christian  x Browse

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