



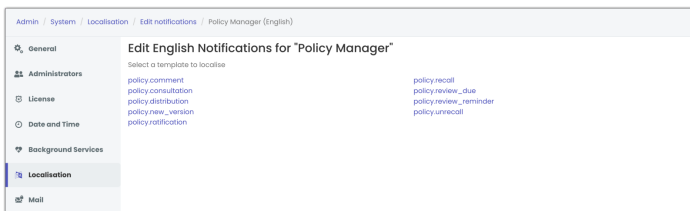
## Policy Manager Notifications

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.

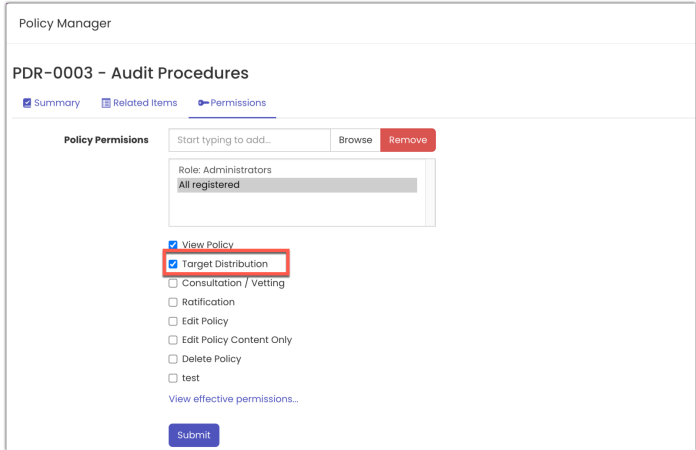
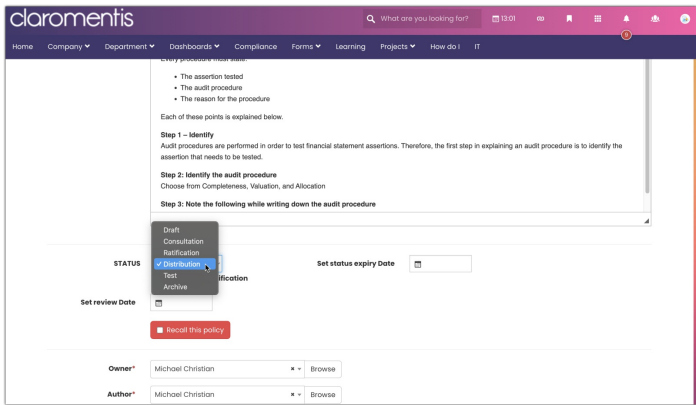
## Standard Notifications

### To accept/deny a Policy

#### policy.distribution



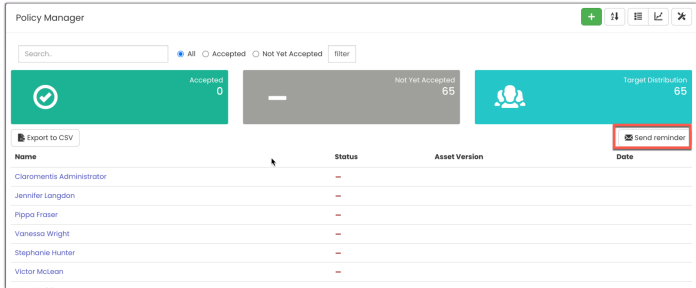
This notification will fire when a Policy has been put into 'Distribution' status (it has been made live) and the recipients will be users with 'Target Distribution' permission so that they can read and accept the policy.



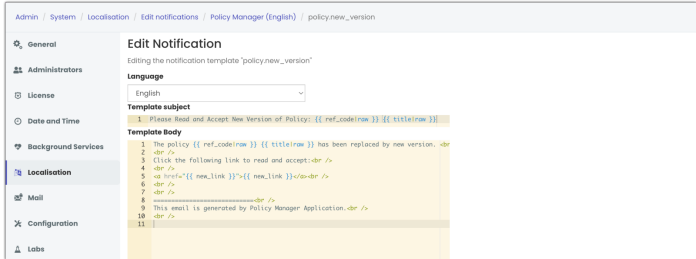
**Please note:** The user that moves the policy into distribution status will NOT receive a notification even if they are in 'target distribution' permission.

### Send reminder

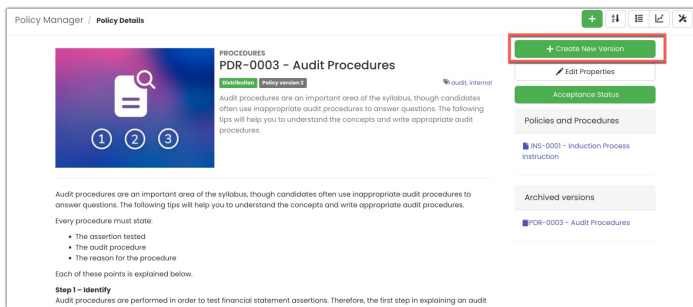
This feature can be used by an administrator to send the distribution email template to any users who have not yet accepted the policy.



### policy.new\_version



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.

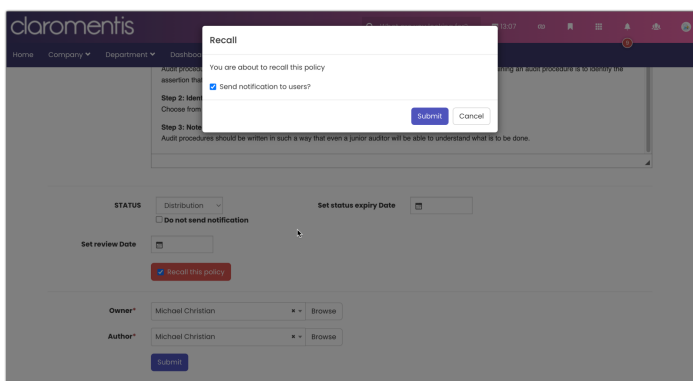
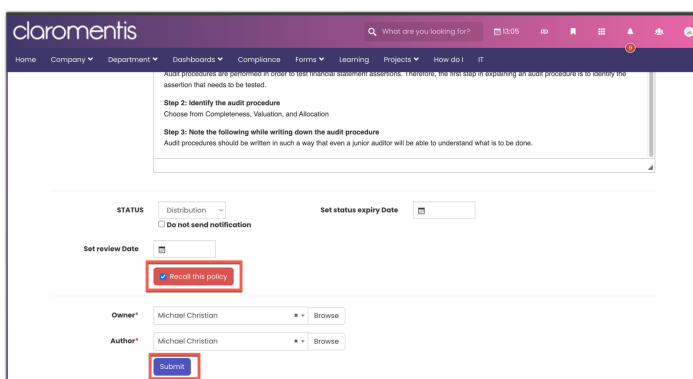
## To recall a Policy

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



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

Set review Date 

05-07-2024

Recall this policy

Owner\* 

Michael Christian

Author\* 

Michael Christian

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

General

Administrators

License

Date and Time

Background Services

Localisation

Mail

Configuration

Logs

Integrations

Edit Notification

Editing the notification template "policy\_review\_due"

Language 

English

Template subject

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

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

Template Body

1 The review date for the following policy is going to expire today:-dr />

2

3 {{ ref\_code\_row }} {{ title\_row }}-dr />

4 {{ description\_row }}-dr />

5 Created by {{ creator\_row }}-dr />

6 Owner {{ owner\_row }}-dr />

7 Category: {{ category\_row }}-dr />

8

9 Click the following link to view:-dr />

10

11 <a href="{{ link\_row }}">{{ title\_row }}</a>-dr />

12

13

14

15 This email is generated by Policy Manager Application.-dr />

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:

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"/>	Ratification	<div>Ratification</div>	Ratification	
<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	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

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

General

Administrators

License

Date and Time

Background Services

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Configuration

Logs

Integrations

Edit Notification

Editing the notification template "policy.consultation"

Language

English

Template subject

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

Template Body

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

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 the approval 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

Home

Company

Department

Dashboards

Compliance

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Projects

How do I

IT

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

Recall this policy

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

General

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Logs

Edit Notification

Editing the notification template "policy.comment"

Language

English

Template subject

[[ commented\_by ]] made a comment in Policy: [[ ref\_code ]] - [[ title ]]

Template Body

```
1 [[ commented_by ]] made a comment in Policy: [[ ref_code ]] - [[ title ]]-dr />
2
3
4 Comment-dr />
5 [[ comment_msg ]]-dr />
6
7 Policy Stage: [[ stage_title ]]-dr />
8
9 <a href="{{ link }}">{{ link }}</a>-dr />
10
11
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.

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What are you looking for?

13:38

Home

Company

Department

Dashboards

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Projects

How do I

IT

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

Audit procedures should be written in such a way that even a junior auditor will be able to understand what is to be done.

Download as PDF

Policy Details

Comments

Asset History

Policy History

Approval History

Consultation

Optional comments unless you intend to reject.

Accept

Reject

Category

General

Status Changed by

Claromentis Administrator

Review Date

22 March 2024

Author

Michael Christian

Creator

Michael Christian

Owner

Michael Christian

policy.ratification

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

General

Administrators

License

Date and Time

Background Services

Localisation

Mail

Configuration

Logs

Integrations

Edit Notification

Editing the notification template "policy.ratification"

Language

English

Template subject

1 {{ ref\_code|raw }} {{ title|raw }} Stage: {{ stage\_title|raw }} requires your attention

Template Body

1 The following policy has been {{ if is\_new\_policy X }} created {{ else X }} moved to status  
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 'Ratification' status and will be sent to 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.

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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

Draft

Consultation

Ratification

Distribution

Test

Archive

Set review Date

Set status expiry Date

Owner\*  
Michael Christion

Author\*  
Michael Christion

Submit

Last modified on 21 March 2024 by Veronica Kim

Created on 15 March 2024 by Hannah Door

Tags: notification, policy, policy manager