Link to article: https://discover.claromentis.com/knowledgebase/articles/965/policy-manager-notifications



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

🗣 General	Edit Notification
	Editing the notification template "policy.distribution"
Administrators	Language
Ucense	English ~
	Template subject
O Date and Time	1 Please Read and Accept Policy: {{ ref_codelraw }} {{ title!raw }} Stage: {{ stage_ti
	Template Body
Background Services	 The following policy has been (% if is_new_policy %) created (% else %) moved to st der /> Please read and accept the following policy: der />
tocalisation	<pre>4 der /s de single de la contraction de la</pre>
₫ [₽] Mail	 Created by {(creator }).dor /> Omer {(oner }).dor /> Contexprv; {(creator }).dor />
⊁ Configuration	18 dpr /> 11 Click the following link to read and accept:dpr /> 12 dpr />
<u>A</u> Labs	13 on heref="{{ link }}">{{ link }}~>{{ link }}~>{
Integrations	16

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.

Home Company Y Department		
	t * Dashboards * Compilance Forms * Learning Projects * How do I IT	
	The add procedure The add procedure The add procedure The add 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 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	Dah Cowitation 20 Derbanon Teat fination	
Set review Date	Archive	
	Recet the policy	
Owner*	Michael Christian X * Browse	
Author*	Michael Christian x v Browse	
PDR-0003 - Audi		
	S-Permissions	
Summary 🗄 Related	S-Permissions	
Summary 🖪 Related	d Items • Permissions • Stort typing to add Browse Remove Role: Administrators	
Summary 🖪 Related	d Items • Permissions Start typing to add Browse Remove Role: Administrators All registered 2 View Policy	
Summary 🖪 Related	Items • Permissions • Start typing to add Browse Role: Administrators Alfregistered • View Policy Target Distribution Consultation / Vetting Cationality in the second	
Summary 🖪 Related	d Items Consultation / Vetting Consultation /	
Summary 🖪 Related	Start typing to add. Browse Remove Role: Administrators All registered 2 View Policy Granget Distribution Consultation / Vetting R stillcation Etille Policy E dit Policy E dit Policy	
Summary 🖪 Related	Items 9- Permissions Items Start typing to add Browse Remove Role Administrators All registered Items Items in the start of	
Summary 🖪 Related	Items • Permissions • Start typing to add Browse Role: Administrators Alfregistered • If Wew Policy • Target Distribution • Consultation / Vetting • Additionation • Edit Policy	
Summary 🖪 Related	Items 9- Permissions Items Start typing to add Browse Remove Role Administrators All registered Items Items in the start of	

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				+ # = 2 ×
Search.	All Accepted Not Yet	Accepted filter		
\oslash	Accepted 0		Not Yet Accepted 65	Torget Distributio 61
Export to CSV				Send reminde
Name	•	Status	Asset Version	Date
Claromentis Administrator		-		
Jennifer Langdon		-		
Pippa Fraser		-		
Vanessa Wright		-		
Stephanie Hunter		-		
Victor McLean		-		

policy.new_version

🗘 General	Edit Notification
\$1. Administrators	Editing the notification template "policy.new_version"
Administrators	Language
Elicense	English ~
 Date and Time 	Template subject 1 Please Read and Accept New Version of Policy: {{ ref_codelraw }} {{ titleIraw }}
 Date and Time 	Template Body
Background Services	1 The policy {{ ref_codeinsw }} {{ titleinsw }} has been replaced by new version. do dor >> 3 (lick the following link to read and accept; dor >>
tocalisation	<pre>4 dor > 5 on hee="{ new_link }}">{{ new_link }}-ado-der > 6 dor > </pre>
図 ⁸ Moil	9 This enail is generated by Policy Manager Application.de />
⊁ Configuration	10 dr />
∆ Labs	

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.





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.



Caveats for acceptance notifications

If you were expecting acceptance (distribution, new version templates above) 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 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

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 Policy expires 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

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:

olicy permissions	Status d	etails			
ategories	Enabled	Name *		Duration (days)	Rights Label *
olicy Types	12	Draft	Draft		n/a
tatus Details		Consultation	Consultation		Consultation / Vetting
olicy Default Permissions		Ratification	Retification		Ratification
ser Report Permissions	5	Distribution	Distribution		n/a
onfiguration		Test	Test		test

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

General	Edit Notification
Administrators	Editing the notification template "policy.consultation" Language
License	English
Date and Time	Template subject 1 [(ref.codelrow]) [[titleIrow]] Stage: [[stage.titleIrow]] requires your attent Template Body
Background Services	1 The following policy has been (% if is_new_policy %) created (% else %) edited and/ 2 dbr />
Localisation	3 {[ref.code]] {[title]}der /> 4 {[description]}der /> 5 Created by {[creator]}der /> 6 @emr {[omer]}der />
Mail	7 Category: [[category]]-br /> 8 dr />
Configuration	9 Click the following link to view.ier ∧ 10 der ∧ 11 de her[= [[link]]>[[link]]>[desder ∧ 13 This see will be experied on (f expr.dste])der ∧
Labs	14 der />
tegrations	16 This email is generated by Policy Manager Application.dor />

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.



policy.comment

Admin / System / Localise	ation / Edit notifications / Policy Manager (English) / policy.comment
Q, General	Edit Notification
Administrators	Editing the notification template "policy.comment" Language
C License	English ~ Template subject
 Date and Time 	<pre>1 {{ commented_byirow }} made a comment in Pulicy: {{ ref_codeirow }} - {{ titleIrow }} Templete Body</pre>
Background Services	<pre>1 {{ commented_bylrow }} made a comment in Policy: {{ ref_code }} - {{ title }}-dr /> 2 /></pre>
tocalisation	3 Policy approal by comment: {{ approval_status }} dr >> 4 Comment.dr >> 5 {{ comment_mg }} dr >>
ஸ Mail	7 Policy Stoge: {{ stoge_title }}-der /> 8 - der /> 9 - an herfer"{{ link }}*>{{ link }}-({ link })-(a-der />
⊁ Configuration	10 dbr /> 11
≜ Labs	

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

🕏 General	Edit Notification
Administrators	Editing the notification template "policy.ratification" Language
Elcense	English ~
O Date and Time	<pre>1 {{ ref_codelraw }} {{ titlelraw }} Stage: {{ stage_titlelraw }} requires your attent Template Body</pre>
Background Services	The following policy has been {% if is_new_policy %} created {% else %} moved to st <pre>chr /></pre>
🔯 Localisation	3 {{ ref.code }} {{ title }}der /> 4 {{ description }}der /> 5 { reated by {{ reator }}der /> 6 { Owner {{ description }}der /> 6 { Owner {{ description }}der /> 6 { Owner {{ description }}der />
惑 Mail	<pre>0 Unner (L Uniter) on r> 7 Category : { Category }} dor /> 8 dor /> 9 Click the following link to view:dor /></pre>
⊁ Configuration	18 dr /> 11 do href="{{ link }}">{{ link }}">{{ link }}">{{ link }}">{
<u>∆</u> Labs	13 This stage will be expired on {{ expiry_date }} dr /> 14 dbr /> 15
Integrations	16 This email is generated by Policy Manager Application. dor /> 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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