

## Create and publish new policy

Antoinette France - 2023-11-14 - Manage Content

## Create and publish new policies in Holocentric Connect

To create and publish policies, a user must have one of the following permissions in Holocentric Connect:

- Policy editing
- Model Administration
- Administration

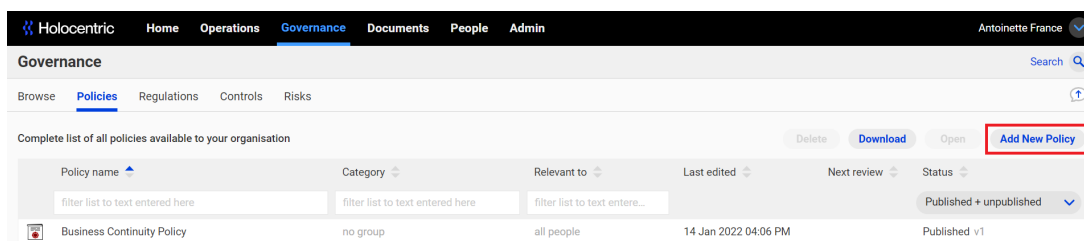
System administrators can change permissions for users by going to **People > Users**.

This article includes the following topics:

1. Add new policy
2. Approve and publish new policy

### 1. Add new policy

1.1 Access the **Policies** tab and click **Add New Policy**. The release management workflow appears. Click **OK** to start editing.



1.2 Complete all the relevant sections in the overview.

**Governance** > Policies Search

### Add a new Policy

**GENERAL DETAILS**

Policy name:  Cancel

Description:  Save

External reference identifier:

External source link:

Related Documents:  Add

Related Stakeholders:  Add

**COMPLIANCE**

Governing Obligations:  Add

Governing Regulations:  Add

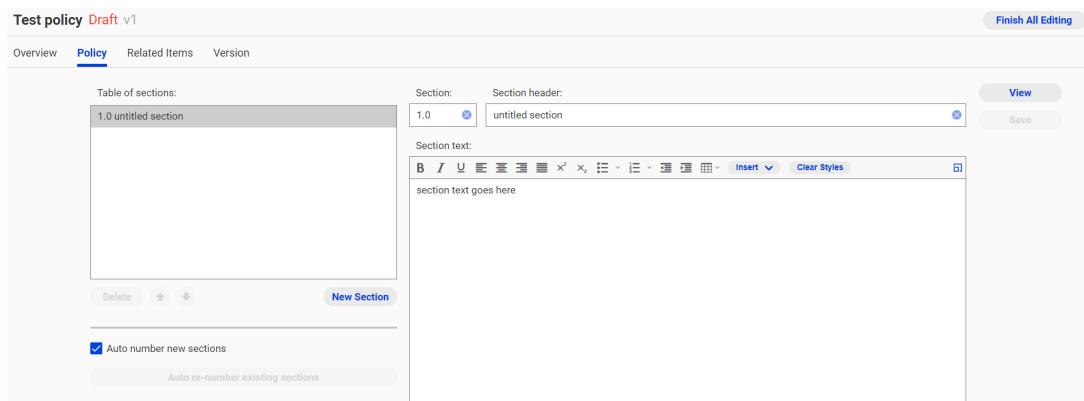
Applicable Processes:  Add

Note: above screenshot only showcases selection of fields, more available on scroll.

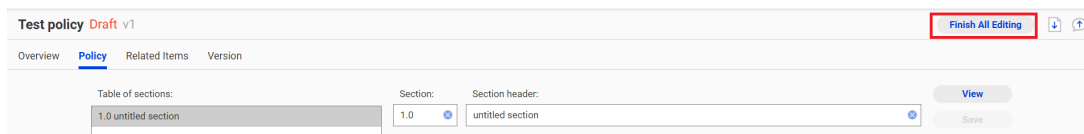
| Field                         | Description                                                                                                                                                                           |
|-------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Policy name                   | This is shown as the title of the policy.                                                                                                                                             |
| Description                   | Overview of the policy such as background and/or purpose                                                                                                                              |
| External reference identifier | An identification code/number for the item. This can be used if the item is being migrated from a different system or if a system of identifiers is required. This field is optional. |
| External source link          | The source internet URL if linked from an external system                                                                                                                             |
| Related Documents             | Documents that are related to the policy.                                                                                                                                             |
| Related Stakeholders          | Positions that are stakeholders to this policy.                                                                                                                                       |
| Governing Obligations         | Obligations that influence or govern this policy.                                                                                                                                     |
| Governing Regulations         | Regulations that influence or govern this policy.                                                                                                                                     |
| Applicable Processes          | Processes that this policy applies to                                                                                                                                                 |
| Summary                       | A short description of the policy that appears in the <b>Browse</b> subtab.                                                                                                           |
| Roles this is relevant to     | The work roles and people to which the policy is related (e.g. Procurement Analyst)                                                                                                   |

|                                                        |                                                                                                                                                                                                                                                                                                                                                                                               |
|--------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Category                                               | The relevant policy group.                                                                                                                                                                                                                                                                                                                                                                    |
| Required reading (for customers with Attestation only) | Tick this box to make this item required reading for all roles to which the item is relevant.                                                                                                                                                                                                                                                                                                 |
| Related regulations                                    | Link to regulations including the legislation and standards governing the policy.                                                                                                                                                                                                                                                                                                             |
| Keywords for 'Search'                                  | Keywords that, when searched in Holocentric Connect, will make the item come up in search results.                                                                                                                                                                                                                                                                                            |
| Remove from view                                       | <p>Tick the box to hide the item. This will make the item only visible to users with Administrator permissions. Hidden items will:</p> <ul style="list-style-type: none"> <li>• not shown in lists</li> <li>• not shown as a related item on any other items.</li> <li>• not accessible by URL (will show item not found message)</li> <li>• not shown in any downloadable report.</li> </ul> |

1.3 Add content to your policy by creating and writing policy sections. You can edit the section number, title, and order.



1.4 When you have finished editing click **Save** to commit the changes and click **Finish All Editing**.



1.5 A release management workflow appears. Write a summary of what you added to the policy and click **Finish All Editing** to move to the approval stage.

**Finish all Editing for this Policy**

Start Editing      Finish All Editing      Approve      Publish

This item will no longer be editable and will be set to 'Awaiting Approval'

Summary of what was changed:

New Policy

*i* This item is required to be read by any Roles to whom the item is relevant

Cancel      **Finish All Editing**

## 2. Approve and publish a new policy

2.1 Click **Approval**. A dropdown menu appears. You can approve the policy or you can revert it if you want to make further changes to your content.

Governance > Policies      Search

Test policy **Awaiting Approval** v1

Approval      ↓      ↑

Approve

Revert to Draft

Overview      **Policy**      Related Items      Version

1.0 untitled section  
section text goes here

2.2 You can edit your summary of what additions you made. You also have the option to select who approved the item, the date on which it was approved as well as the next review date. Click **Approve** to continue to the publication stage. Once approved, the policy is marked 'Ready to Publish'.

*Note: As with other aspects of web app content, you can edit version control information for policies, processes, documents and work instructions using the **Version** subtab.*

### Approve this Policy

Start Editing      Finish All Editing      **Approve**      Publish

Approve that "Test policy" is ready to publish.

Approved by:

Antoinette France

Approved on:

02 Aug 2022

Next review:

Select when this version should next be reviewed

Summary of what was changed:

New Policy

**i** This item is required to be read by any Roles to whom the item is relevant

### TIP

If the new policy is part of a larger release (i.e. a release with multiple content updates), leave it marked 'Ready to Publish'. When you are ready, you can publish it at the same time as your other content updates by accessing the **Home** tab and clicking **Manage Changes**.

2.3 To proceed with publication, click **Publishing** and **Publish Immediately**.

Governance > Policies Search 🔍

Test policy Ready to Publish v1

Overview Policy Related Items Version

1.0 untitled section  
section text goes here

**Publishing** ▾

Publish Immediately

Revert to Draft

When you confirm publication, the release management workflow appears. You have the option to edit the summary of the changes that you have made. Click **Continue**.


2.4 The release label and notes window appears. Write official release notes for the new policy. You can edit the release notes later if required.

## Release label and notes

Publishing: "Test policy"

Label this release:

Release notes:

New Policy

Post a News Item about this when the items are published

News Item title:

News message:

Include a link to the Release summary

Email notification:  Email all users when this News Item is published

| Field                                                    | Description                                                                                                                                                                                   |
|----------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Label this release                                       | The official name of this release.                                                                                                                                                            |
| Release notes                                            | Details about what updates you have made.                                                                                                                                                     |
| Post a news item about this when the items are published | If selected, you can post a news item on the Home tab to notify users about your content changes.                                                                                             |
| News item title                                          | Title of the news item that will appear in the Home tab.                                                                                                                                      |
| News message                                             | The message that will appear under the news item title.                                                                                                                                       |
| Include link in release summary                          | If selected, this option will allow you to include a link to the release notes for the item.                                                                                                  |
| Email all users when this News Item is published         | If selected, all web app users in your organisation (provided they have activated their account) will receive an email notification about the release at 5:30 am AEDT/AEST the following day. |

2.5 Click **Publish** to officially release the new policy. It will now be visible to all web app users in your organisation.

**END**