

## Edit, review and approve policy

Antoinette France - 2023-11-14 - Manage Content

## Edit, review and approve policies in Holocentric Connect

To edit, review and approve policies, a user must have one of the following permissions in the Connect system:

- Policy editing
- Model Administration
- Administration

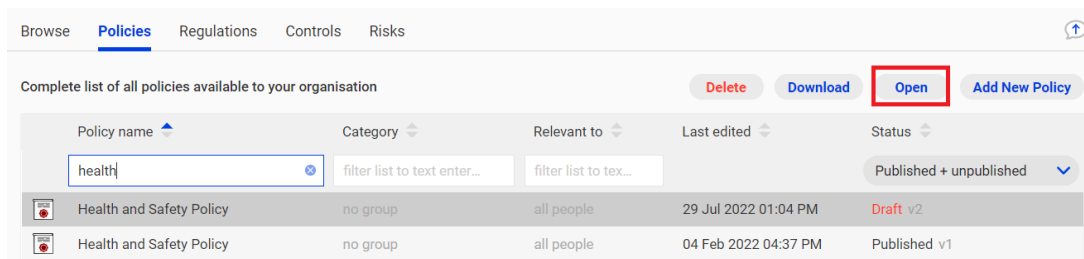
System administrators can change permissions for users by going to **People > Users**.

This article includes the following topics:

1. Edit existing policy
2. Approve updated policy

### 1. Edit existing policy

1.1 Open the policy you want to edit. If the policy already has a draft version (or a version that is awaiting approval/publication) open this version to edit, not the older published version.



The screenshot shows the 'Policies' section of the Holocentric Connect interface. At the top, there are navigation tabs: 'Browse', 'Policies' (selected), 'Regulations', 'Controls', and 'Risks'. Below the tabs, there is a search bar with the text 'health' and a search icon. To the right of the search bar are buttons for 'Delete', 'Download', 'Open' (highlighted with a red box), and 'Add New Policy'. Below the search bar is a table with the following columns: 'Policy name', 'Category', 'Relevant to', 'Last edited', and 'Status'. The table contains two rows of data:

Policy name	Category	Relevant to	Last edited	Status
Health and Safety Policy	no group	all people	29 Jul 2022 01:04 PM	Draft v2
Health and Safety Policy	no group	all people	04 Feb 2022 04:37 PM	Published v1

*Note: If the policy is already marked 'Awaiting Approval' or 'Ready to Publish', open the policy and revert to a draft so you can edit.*

1.2 You can edit either the policy sections, overview or version control. Click through the tabs to explore your editing options.

# Health and Safety Policy **Draft** v2

Overview **Policy** Related Items Version

When editing **Overview** you can:

- edit the policy name, description (the introduction to your policy) and short summary (the text that will appear when browsing policy)
- attach related documents
- assign the policy to relevant roles
- select a policy category (the group to which the policy belongs)

When editing **Policy** you can:

- add a new policy section
- edit section title, number and content
- reorder policy sections
- delete sections



When editing **Version** you can add/edit:

- which user approved the policy
- the date on which the policy was approved
- summary of previous content changes
- the date of next review

*Note: If the item is not in a draft state, click **Start Editing**.*

## IMPORTANT

When the policy is in a draft or approved state (and before it is published), it will be a duplicate of the latest published version of the same policy. Until you publish the draft, you will see two different items with the same name when you view all your policies in list view. When you publish the draft, only the latest version will be available (that is, there will no longer be a duplicate).

	Health and Safety Policy	no group	all people	29 Jul 2022 01:04 PM	<b>Draft</b> v2
	Health and Safety Policy	no group	all people	04 Feb 2022 04:37 PM	Published v1

1.3 Click **Edit** and make all relevant changes.

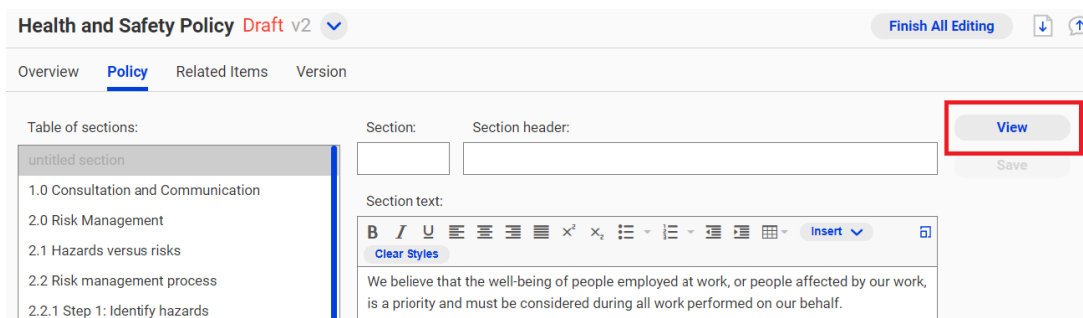
Health and Safety Policy **Draft** v2  Finish All Editing 

**Overview** Policy Related Items Version

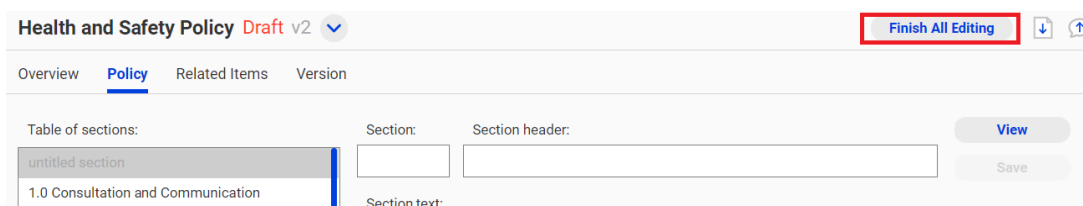
GENERAL DETAILS Edit

1.4 When editing the **Policy** section, you can preview your policy by clicking **View**. This

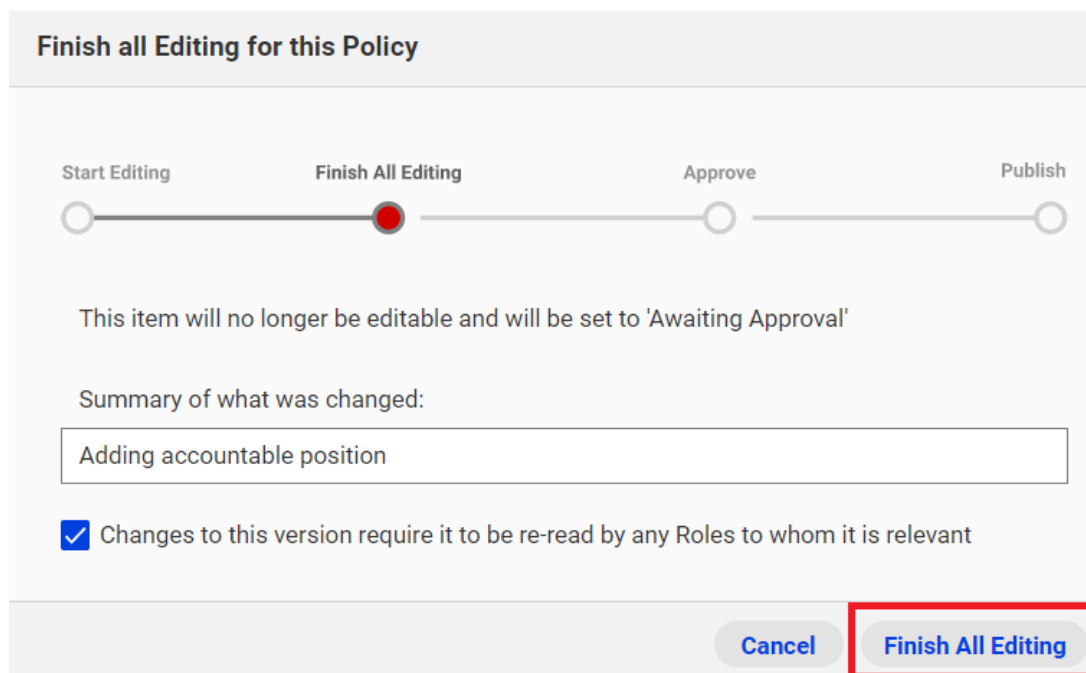
shows you how your policy will appear in the web app once it is published. Click **Edit** to return to policy editing mode.



1.5 When you have made all the required changes, click **Finish All Editing**.



1.6 A release management workflow appears. Write a summary of what was changed and click **Finish All Editing**. The new policy version is now ready for approval.



## 2. Approve updated policy

2.1 To approve a new policy version click **Approval**. You will have the option to either approve the policy or revert it to draft.

**Governance** > Policies Search

**Health and Safety Policy** Awaiting Approval v2 Approval ▾

Overview **Policy** Related Items Version

We believe that the well-being of people employed at work, or people affected by our work, is a priority and must be considered during any work performed on our behalf.

2.2 Click **Approve**. The release management workflow appears. You can edit the summary of what was changed and 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 confirm changes.

**Approve this Policy**

Start Editing      Finish All Editing      **Approve**      Publish

Approve that "Health and Safety Policy" is ready to publish.

Approved by:  
 ✕ Select

Approved on:  
 📅

Next review:  
 📅

Summary of what was changed:

Changes to this version require it to be re-read by any Roles to whom it is relevant

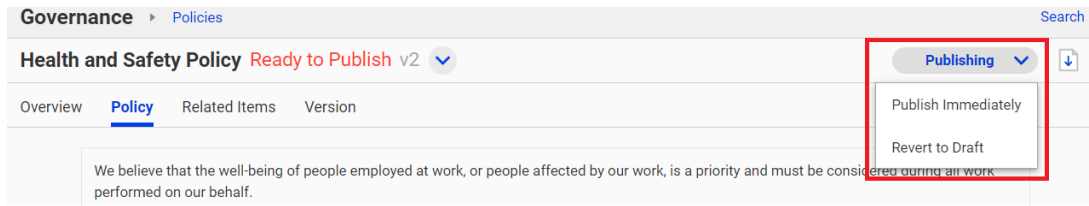
Cancel Approve

**TIP**

If the updated 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 publish the new policy version, click **Publishing**. At this stage, you can still revert the policy to a draft to make further changes. When you have finished all editing, click

## Publish Immediately.



Governance > Policies Search

Health and Safety Policy Ready to Publish v2

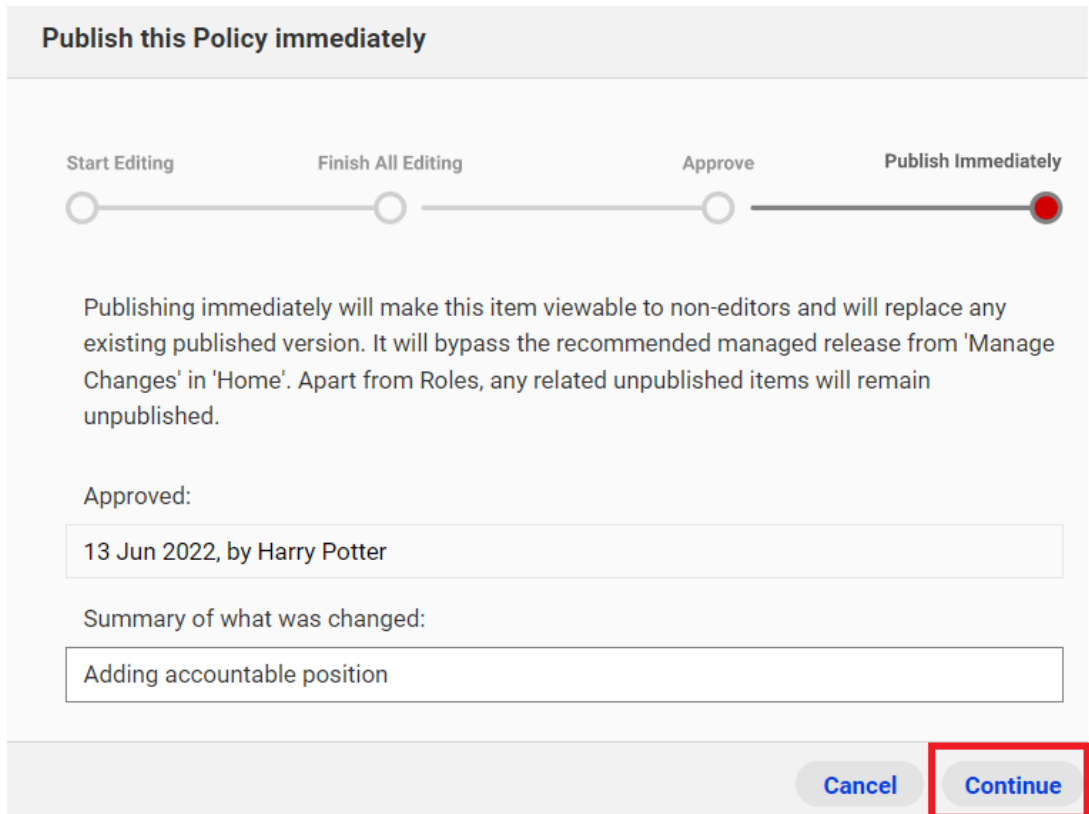
Overview Policy Related Items Version

We believe that the well-being of people employed at work, or people affected by our work, is a priority and must be considered during all work performed on our behalf.

Publishing

- Publish Immediately
- Revert to Draft

2.4 When you confirm publication, a release management workflow appears. You have the option to edit the summary of what was changed. Click **Continue** to publish the new policy version.



### Publish this Policy immediately

Start Editing      Finish All Editing      Approve      Publish Immediately

Publishing immediately will make this item viewable to non-editors and will replace any existing published version. It will bypass the recommended managed release from 'Manage Changes' in 'Home'. Apart from Roles, any related unpublished items will remain unpublished.

Approved:

13 Jun 2022, by Harry Potter

Summary of what was changed:

Adding accountable position

Cancel      Continue


2.5 The release label and notes window appears. Write official release notes about the new policy version. You can edit the release notes later if required.

## Release label and notes

Publishing: "Health and Safety Policy"

Label this release: Health and Safety Policy v2 Release ✕

Release notes:

  
Adding accountable position

Post a News Item about this when the items are published

News Item title: Health and Safety Policy has been changed ✕

News message: View the release notes for the published items ✕

Include a link to the Release summary

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

Cancel

Publish

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.

2.6 Click **Publish** to officially release the new policy version. It is now visible to all users.

**END**