

## Policy Management

Record and manage Policies and Attestations.

### Functionality

- ✓ Ability to create a Policy through an approval and review process.
- ✓ Ability to attach the full document or any other document that supports the Policy.
- ✓ Ability to capture attestations/acknowledgements to a Policy.
- ✓ Ability to update the version of a Policy.
- ✓ Ability to archive a Policy.
- ✓ Ability to capture activity or change history of the Policy.
- ✓ Ability to report on current version, previous version, and archived Policies.
- ✓ Ability to report on Policies that are overdue for review.
- ✓ Ability to set target audience for a Policy.
- ✓ Ability to report on Acknowledgements that are overdue.
- ✓ Ability to report on actionable items (Policies that: I created, requires my approval, requires my review, and requires my acknowledgement )
- ✓ Ability to automatically initiate review process for Policies that are due for review.
- ✓ Ability to initiate acknowledgement process to the desired target audience.
- ✓ Ability to automatically send notifications to respondent for overdue reviews and acknowledgements.

## Security Roles

<b>Policy Author</b>	Ability to create, view, edit, and archive policies they created.
<b>Policy User</b>	Ability to view policies only they are an Audience of, review a policy they are an Reviewer, and edit a policy where they are the Owner/Approver and when status is pending approval.
<b>Administrator</b>	Administration access to all objects and ability to make configuration changes.