Policy Express for Microsoft 365

Explore • Explain • Experience • Expand • Expert

Why Policy Express?

1 **Functionality**
- **Automation** drives data driven approval **workflows**
- Powerful **search**, **acknowledgement** & **feedback** components
- Management **dashboards** to track compliance

2 **Platform**
- **Sits within your** existing **Microsoft 365 environment**
- All your **data remains in your tenant**

3 **Fully Inclusive**
- One fixed fee includes a **perpetual licence** for all functionality
- Includes **deployment**, **configuration** & **training**

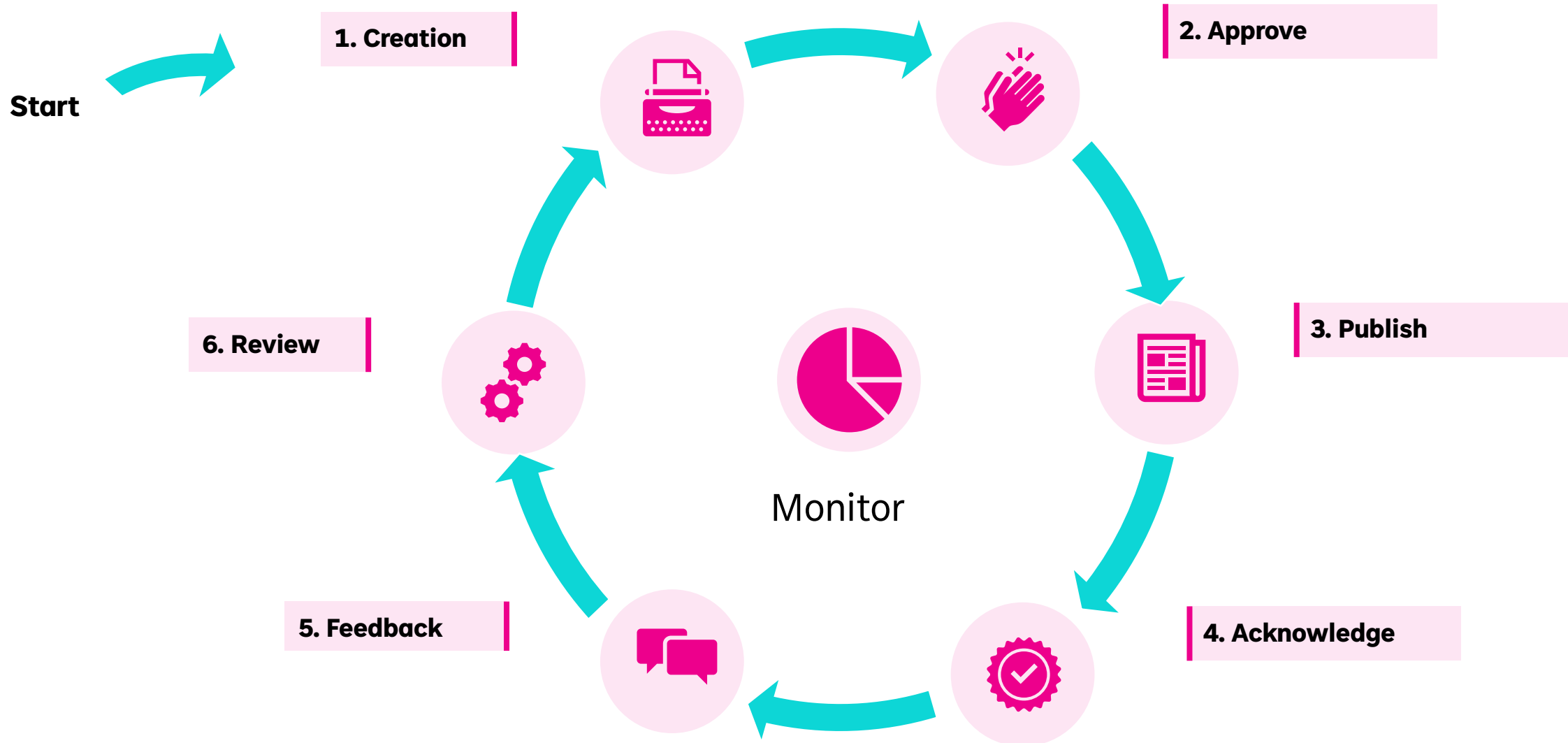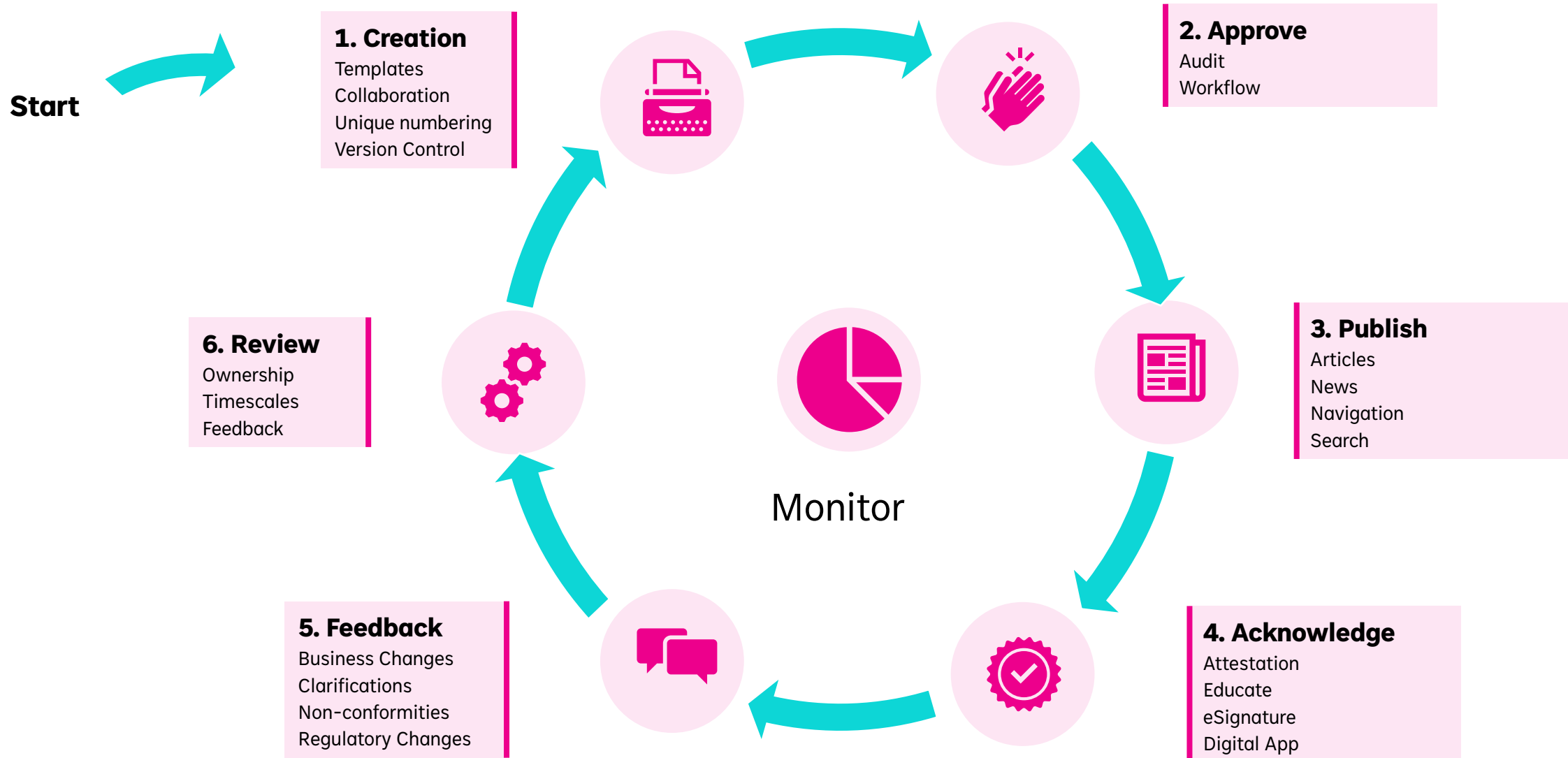**4** **Optional Support**
- **Expert Success** gives you **on-going peace of mind**
- Extend our service to cover your entire SharePoint Environment

Policy Life Cycle

Start

1. Creation

2. Approve

3. Publish

4. Acknowledge

5. Feedback

6. Review

Monitor

Policy Life Cycle

Start

1. Creation
Templates
Collaboration
Unique numbering
Version Control

2. Approve
Audit
Workflow

3. Publish
Articles
News
Navigation
Search

4. Acknowledge
Attestation
Educate
eSignature
Digital App

5. Feedback
Business Changes
Clarifications
Non-conformities
Regulatory Changes

6. Review
Ownership
Timescales
Feedback

Monitor

Office Templates

Publish and start from templates in desktop Word, PowerPoint and Excel

Certificate of Satisfaction   Change Control Agreement   Confidentiality Agreement (Mutual) - Information EXP

Tag and Categorise

Configured taxonomy to reflect your organisation

Keywords (DMS)

Family Leave ✕   Absence and Leave

Absence and Leave
in Keywords

Owners (DMS)

DS Diego Siciliani ✕ Enter a name or email address

Unique Reference

Automatic numbering for each document
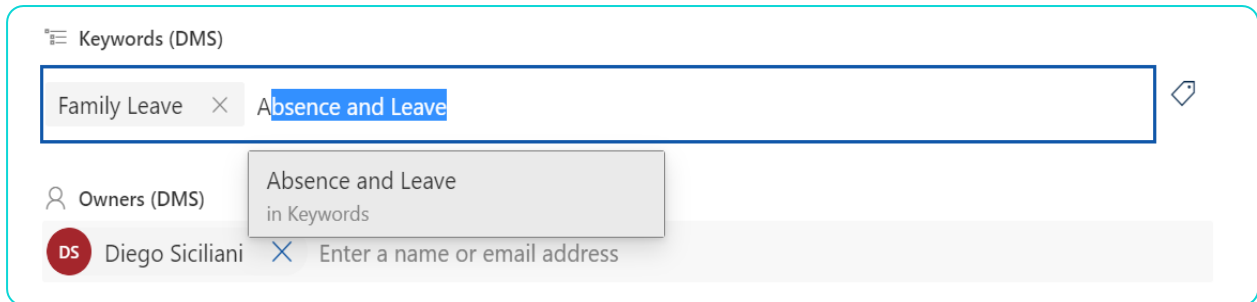
	Name ⌄	Document Number ⌄	Department ...
W	Employee Handbook – Data Protection.docx	IEXP-CP-P-02	Compliance
W	Employee Handbook – Whistleblowing Policy.d...	IEXP-CP-P-01	Compliance

1. Creation

2. Approve
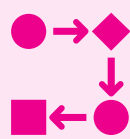
Approval Process

Stage 1: Assign to SME* based on classification

Stage 2: Second level Quality approver

Stage 3: Convert to PDF & Publish to Hub

Audit

Each action is logged by time & user

DMS - Request First Approval

Owner: Megan Bowen

Approver *

Megan Bowen

Suggested People

MB Megan Bowen
    Marketing Manager

ⓘ This message was sent with Low importance

Megan Bowen
Tue 1/25/2022 6:19 AM
To: Megan Bowen

An approval for a document you submitted has been approved and will be published to the documents area.

Name: Employee Handbook – Expenses Policy and Procedure

Approved By: Megan Bowen

Link to Document: Here

Comments (if any):

Reply | Forward

---

* SME = Subject Matter Expert

3. Publish

News
For urgency & visibility

Navigation
Drill down journey

Pages
For reference and in context

Search
Indexed for filters and free-text

Search Filters

Type ⌃

AND/OR

Search a value...

☐ Policy

[Apply] [Clear]

Department ⌃

AND/OR

Search a value...

☐ HR

[Apply] [Clear]

Search Results

Employee Handbook – Shared Parental Leave

Megan Bowen January 19, 2022

may make up to three requests for **leave**, including any changes to previously booked **leave** • a request for a continuous period of **leave** becomes ...

HR Policy Family Leave

Employee Handbook – Special Leave Policy & Procedure

Megan Bowen January 19, 2022

details of the Company's policy towards special **leave** which falls outside the scope of all other types of **leave** already provided for in this Employee Handbook ...

HR Policy Absence and Leave

Employee Handbook – Paternity Leave and Pay

Megan Bowen January 19, 2022

Week 1 Reading

First this - Week 1 Reading!

See all

Policies

Employee Handbook – Expenses Policy and Procedure

Megan Bowen
Edited 25 Jan 2022

Policies

Employee Handbook – Flexible Working

Megan Bowen
Edited 24 Jan 2022

Policies

Employee Handbook – Holiday Policy

Megan Bowen
Edited 19 Jan 2022

Policies

Employee Handbook – Sickness Absence Policy and Procedure

Megan Bowen
Edited 19 Jan 2022

4. Acknowledge

Assign
Define your audience by group or individual

Attest
Assignees acknowledge the document within the browser

Track
Report on signing status

Power Apps | DMS - Document Acknowledgement

Document Acknowledgement

Documents for Review

Document	Ver.	Due Date
Employee Handbook – Expenses Policy	2.0	31/01/2022
Employee Handbook – Paternity Leave	1.0	31/01/2022
Employee Handbook – Shared Parental	1.0	31/01/2022
Employee Handbook – Sickness Absence	1.0	31/01/2022

Document: Employee Handbook – Expenses Policy and Procedure

Open in New Window

1 / 5

Employee Handbook – Expenses Policy and Procedure

1 EXPENSES POLICY AND PROCEDURE

1.1 Introduction

We (Information EXP) want to ensure that you are fully supported to carry out your role in the business, you are properly reimbursed for legitimate business expenses that you incur and that these expenses are treated appropriately for tax purposes.

The Expenses policy sets out our rules on how you can claim for expenses incurred in the performance of your duties for the Company and covers travel, meals and accommodation, overseas and relocation expenses, business entertainment, gifts and staff parties.

It also explains what expenses can and cannot be claimed for.

This Policy and Procedure applies to all employees and does not form part of the contractual terms of your employment with the Company, which have been or will be provided to you separately.

The Company reserves the right to review, amend and update this policy and procedure from time to time. Any updates will be communicated to you by email as and when necessary.

☑ I acknowledge that I have read and understood the document

Confirm

5. Feedback

Change
Updates to processes & procedures

Clarifications
Drill down

Non-conformities
For reference and in context

Regulatory Changes
Indexed for filters and free-text

✕ Submit Feedback ✓

* Title

Policy

Find items ▼

Feedback Type

Regulatory Change ▼

Description

6. Review

Assign
Each controlled document has an assigned owner

Review Date
A period before the review date a notification is sent to the owner

Feedback
Consider consolidated feedback for the document in question

Document Number ⌄	Owners (DMS) ⌄	Next Review Date ⌄
IEXP-IS-P-02	Allan Deyoung	→ 31/12/2022
IEXP-IS-P-01	Allan Deyoung	⊗ 31/12/2021
IEXP-IS-T-01	Allan Deyoung	⊙ 18/02/2022

Feedback ☆

	Title ⌄	Status ⌄	Policy ⌄	Feedback Type ⌄	Description ⌄
⌄	Status : 1. Open (1)				
	Can I use an iPad mini for email?	1. Open	[IEXP-IS-P-02] Employee Handbook – Bring your own Device Policy.docx	Clarity	Thank you
⌄	Status : 2. Pending (1)				
	What constitutes a device	2. Pending	[IEXP-IS-P-02] Employee Handbook – Bring your own Device Policy.docx	Clarity	Are smart watches covered by the BYOD policy, I fear they may be a security risk
⌄	Status : 4. Closed (1)				
	Update on Vaping	4. Closed	[IEXP-HR-P-10] Employee Handbook – Smoke-Free Policy.docx	Business Change	Policy needs to reflect Vaping in the office garden

7. Monitor

Dashboard
Management view of key KPI's in Power BI

→

Orphan Policies
Identify Policies without owners, or those with owners that have left

→

Admin View
Consider consolidated feedback for the document in question

	Documents	Approvals	Acknowledgement
	28	7	1

By Review Status | By Owners | By Department | By Type

Document Approvals
- Rejected
- Draft
- Stage 0 - Issued
- Stage 1 - Approved
- Stage 2 - Quality Approved
- Stage 4 - eSigned

Documents for Acknowledgement | Acknowledgements by Status

Document Masters

	Name	Document Number	Department ...	Next Review Date	Owners (DMS)	Type (D...	Keywords (DMS)
Department (DMS) : Compliance (3)							
	Employee Handbook – Anti-Corruption and Bri...	IEXP-CP-P-03	Compliance	→ 30/11/2023	Joni Sherman	Policy	Business Policy
	Employee Handbook – Data Protection.docx	IEXP-CP-P-02	Compliance	⊗ 16/10/2022	Joni Sherman	Policy	Business Policy
	Employee Handbook – Whistleblowing Policy.d...	IEXP-CP-P-01	Compliance	→ 05/05/2023	Patti Fernandez	Policy	Business Policy
Department (DMS) : Finance (1)							
	Employee Handbook – Expenses Policy and Pro...	IEXP-F-P-01	Finance	⊗ 24/02/2022	Pradeep Gupta	Policy	Business Policy
Department (DMS) : HR (11)							
	Employee Handbook – Adoption Leave.docx	IEXP-HR-P-12	HR	⊗ 31/12/2022	Diego Siciliani	Policy	Family Leave
	Employee Handbook – Alcohol and Drugs Polic...	IEXP-HR-P-08	HR	→ 11/01/2024	Diego Siciliani	Policy	Health and Safety
	Employee Handbook – Flexible Working.docx	IEXP-HR-P-22	HR	→ 24/08/2023	Megan Bowen	Policy	Benefits Work Life Balance

Features

Stage	Feature	Included
Creation	**Templates:** Policy Templates appear in Word/Excel/PowerPoint	☑
	Classification: Department, Document Type and Keywords	☑
	Policy Identification: Unique Numbering	☑
Approval	**1ˢᵗ Stage:** SME Validation + Approval	☑
	2ⁿᵈ Stage: Executive Approval	☑
	Audit Trail: Signing History	☑
Publishing	**PDF:** Auto-Convert to PDF	☑
	Policy Hub: Navigation, Text and Filtered Search	☑
Acknowledgement	**Policy Attestation:** Employees to attest/acknowledge assigned polices	☑
	Attestation Reporting: Acknowledged and outstanding	☑
Feedback	**Feedback Capture:** Amends and Clarifications	☑
Review	**Review Reminder:** Expiring Policy Owner Notification	☑
	Administration Report: Expiring Policies View	☑
	Aggregated Feedback: For Policy Owners	☑
Monitor	**Management Dashboard:** Chart view *	☑
	Orphan Policies: Ownership report mapped to Microsoft 365 licenced users	☑

* Requires Power BI Licence

Expert Success Service

	Express	Standard
Work Confidently: Here to help *Guidance, minor modifications & solution support*		
• Policy Solution	☑	☑
• Your SharePoint & Teams Platforms		☑
Keep on track: Timetabled Health-Checks		
• Policy Solution Usage	☑	☑
• Intranet usage, SharePoint Site activity and Site owners, External Users		☑
Learn and refresh: User Training		
• 3 Sessions per year on Policy Solution	☑	
• 6 Sessions per year to on any element of Microsoft 365 Productivity Suite		☑
Improve: Be future ready		
• Plain-English updates on What's New in Microsoft 365	☑	☑

You identify 2 Power Users

We'll host unlimited joint 30-minute support calls

Express covers this solution only | Standard covers your entire SharePoint & Teams environment

Financial investment

Solution Investment

Solution	Cost
Policy Express Packaged Solution • Deployment • Configuration • Training • Lifetime Perpetual License	**£9,950 / US$12,000**

Optional On-Going Investment

Expert Success	Investment (Monthly)
• Expert Success Service – Standard *	**£500 / $600**
• Expert Success Service – Basic *	**£250 / $300**
• Additional Power Users (2 included) @ £50 / $60 per user per month	

Expert Success runs on a 12 month contract

information
exp

The Approval Process

Approval Process

Setup Configuration

Stage 0: Define Policy Classifications

Dept. A	Dept. B	Dept. C

Stage 1: Define SME Approvers

Dept A SMEs	Dept B SMEs	Dept C SMEs

Stage 2: Define Quality

Quality Person or Persons (must be named)

Policy Approval Process

Policy Classification

- User drafts the Policy
- Sets the Classification of the document in line with the department

SME Approval - Stage 1

- User Assigns to an SME
- They are restricted selecting a members of the department based on policy classification

Quality Approver – Stage 2

- All Quality Person(s) are notified for 2nd Stage approval
- Once approved by one (on a first to approve basis) the policy is then published

The Deployment Process

Deployment Plan

Week	Activity	Detail
1	Kick Off Call	A planning call with our engagement lead to plan in the key dates and book in the Solution Workshop.
2	Solution Workshop	2- 3 hour workshop to walk through and agree the configuration options.
3	Deployment	We deploy, configure and test the solution.
4	Training	We train your Power Users.
5 - 8	Content Population	You add your content to the solution supported by our weekly calls. You may do this more quickly.
9	Launch	You users can now easily find the policies they are looking for.

information exp

Solution Screenshots

1. Create

Your Policy Template Published within Word

1

2
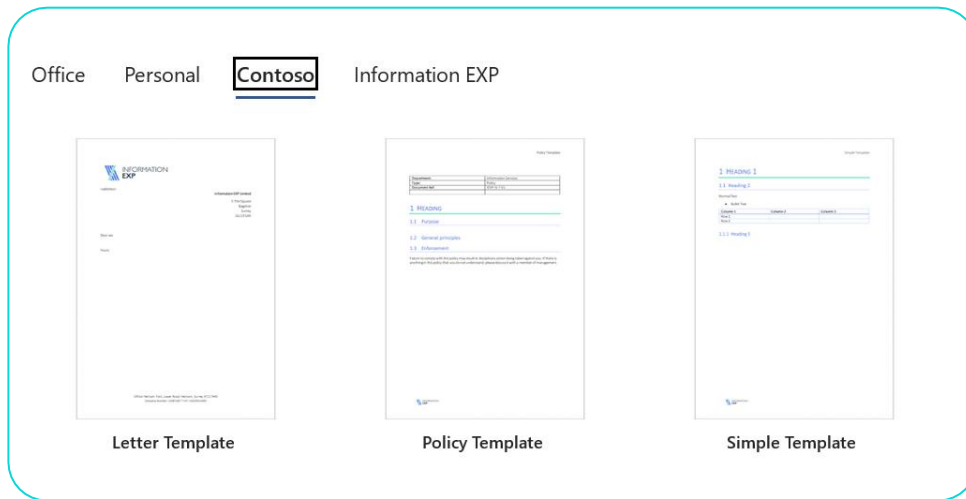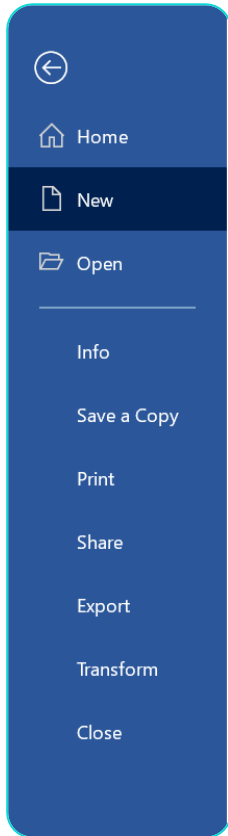
Gain a head-start on driving consistency

3
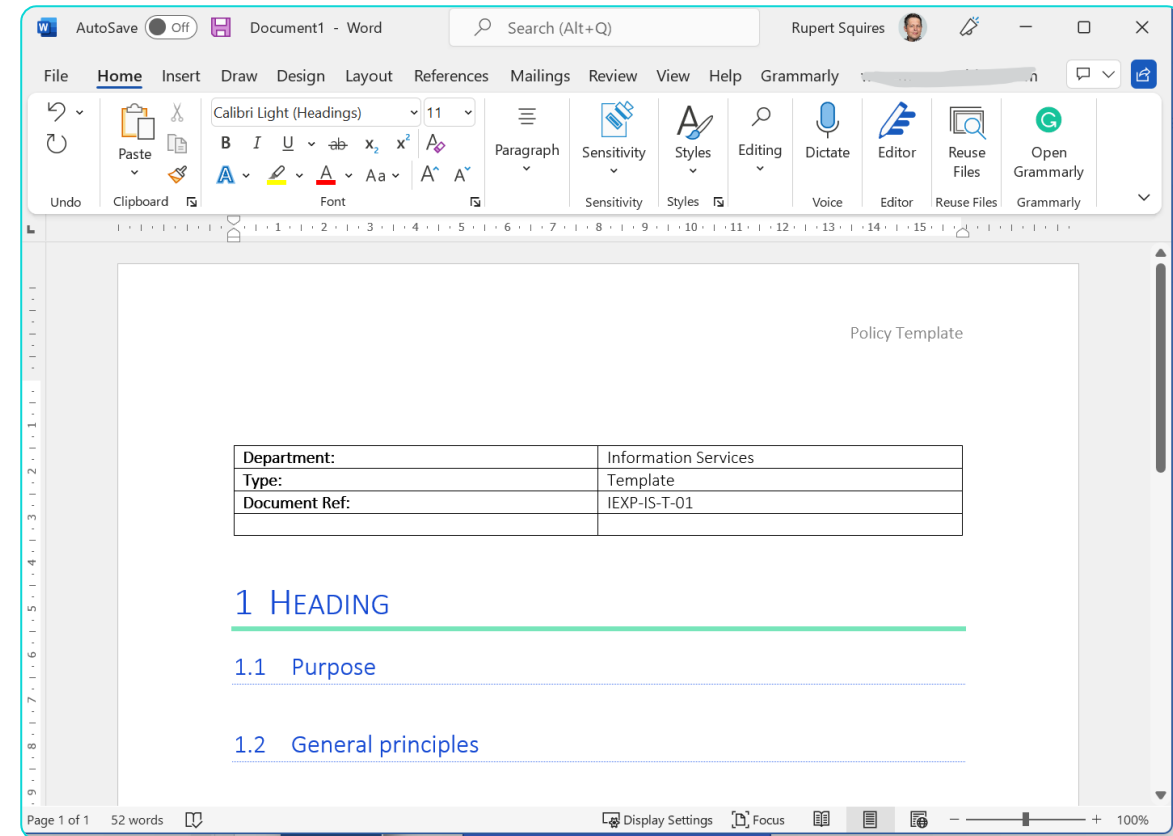
Title

Employee Handbook – Maternitiy Leave and Pay Policy

Department (DMS)

HR

Type (DMS)

Policy

Keywords (DMS)

Family Leave | Absence and Leave

Absence and Leave
in Keywords

Owners (DMS)

DS Diego Siciliani | Enter a name or email address

3 Keywords from a predefined list to help with search

4 Document numbers generated automatically by business rules

	Name	Document Number
W	Employee Handbook – Health and Safety.d...	IEXP-HR-P-09
W	Employee Handbook – Holiday Policy.docx	IEXP-HR-P-06

Version history tracks both document changes and metadata changes

5

By using the date/time you can track which version of a policy was in force at a particular point-in-time.

6

4.0	20/01/2022 12:12 PM		☐ Megan Bowen	74.9 KB
	Title	Employee Handbook – Flexible Working		
	Document ID	29		
	Document Number	IEXP-HR-P-18		
3.0	20/01/2022 12:10 PM		☐ Megan Bowen	74.9 KB
	Type (DMS)	Policy		
	Keywords (DMS)	Work Life Balance; Absence and Leave		
	Owners (DMS)	☐ Megan Bowen		
2.0	20/01/2022 12:08 PM		☐ Megan Bowen	74.8 KB
	Department (DMS)	HR		
1.0	20/01/2022 12:08 PM		☐ Megan Bowen	74 KB
	Title	Employee Handbook – General Information		

2. Approve

Document Masters

	ID		Name	Department...	Type (D
✓	29	W	Employee Handbook – Flexible...	HR	Policy
	9	W	Employee Handbook – Health and Safety.d...	HR	Policy
	7	W	Employee Handbook – Holiday Policy.docx	HR	Policy
	14	W	Employee Handbook – Maternitiy Leave an...	HR	Policy
	11	W	Employee Handbook – Paternity Leave and...	HR	Policy
	12	W	Employee Handbook – Shared Parental Lea...	HR	Policy
	3	W	Employee Handbook – Sickness Absence P...	HR	Policy
	10	W	Employee Handbook – Smoke-Free Policy.d...	HR	Policy

1

Context menu:
- Open
- Preview
- Share
- Copy link
- Manage access
- Download
- Delete
- **2** Automate
- Rename
- Pin to top
- Move to

Automate submenu:
- Request sign-off
- Set a reminder
- **3** DMS - Request First Approval
- Power Automate

Run flow

DMS - Request First Approval

Owner: Megan Bowen

Approver *

Megan Bowen

Suggested People

4 MB **Megan Bowen**
Marketing Manager

Custom 2-Step Workflow for
Approving and Publishing a Policy

Reply all | ⌄   🗑 Delete   ⊘ Junk   Block   ···

You have been assigned a document for Second Stage Approval: Employee Handbook – Expenses Policy and Procedure

Microsoft Flow
Mon 1/24/2022 6:46 AM
To: Megan Bowen

☑ **Approvals** | **Power Automate**

You have been assigned a document for Second Stage Approval: Employ...

Requested by **Megan Bowen** <MeganB@M365x31613757.OnMicrosoft.com>

Date Created   Monday, 24 January 2022 14:46
Link   Employee Handbook – Expenses Policy and Procedure

Please review the document and decide on an action.

- **Approve:** The document is approved, the document will automatically be published.
- **Reject:** This will inform the person who initiated the approval that their document was rejected and cancel the approval process.
- **Temporarily Approve:** This will temporarily publish the document for the next 30 days, at which point it will need to go through another approval process.

5

| Approve ⌄ | Reject ⌄ | **Temporarily Approve** ^ |

Comments

Need work, but ok for the next 30 days.

Submit

Get the Power Automate app to receive push notifications and grant approvals from anywhere. Learn more. This message was created by a flow in Power Automate. Do not reply. Microsoft Corporation 2020.

6

Microsoft Flow
Mon 1/24/2022 6:45 AM
To: Megan Bowen

☑ **Approvals** | **Power Automate**

You have already completed this request.

Get the Power Automate app to receive push notifications and grant approvals from anywhere. Learn more. This message was created by a flow in Power Automate. Do not reply. Microsoft Corporation 2020.

Reply | Forward

7

ⓘ This message was sent with Low importance

Megan Bowen
Tue 1/25/2022 6:19 AM
To: Megan Bowen

An approval for a document you submitted has been approved and will be published to the documents area.

Name: Employee Handbook – Expenses Policy and Procedure

Approved By: Megan Bowen

Link to Document: Here

Comments (if any):

Reply | Forward

3. Publish

Intranet Hub ⌄   Edit

INFORMATION EXP   **Hub**   Edit

+ New ⌄   ⚙ Page details   📊 Analytics

Your News

+ Add ⌄

Hub

Launching our Whistleblowing policy

What is it? Whistleblowing is the act of disclosing information to the employer or the relevant authority by an individual who knows, or suspects, that the Company is responsible for or taking part in...

News articles – focused on significant changes and introductions

Intranet Hub ⌄   Edit

INFORMATION EXP   **Hub**   Edit   + Create site

+ New ⌄   ↪ Send to ⌄   ⟲ Promote   ⚙ Page details   📖 Immersive Reader   📊 Analytics

Launching our Whistleblowing policy

Megan Bowen
Marketing Manager

What is it?

Whistleblowing is the act of disclosing information to the employer or the relevant authority by an individual who knows, or suspects, that the Company is responsible for or taking part in some wrongdoing.

Contacting the FCA

When reporting your concerns to us, it's important you first understand the whistleblowing process.

You may be nervous about making a report about your employer or someone that you know well. So, to make sure you are comfortable with the whistleblowing journey, here are the steps you should take and what we will do when you report the wrongdoing to us.

Related Documents

Related Resources

📋 FCA: Whistleblowing

🧑 Policy Feedback

🛡 Whistleblowing for employee GOV.UK

Who to Ask

Patti Fernandez
President

Joni Sherman
Paralegal

Intranet Hub ⌄

Policies & Procedures

Policy Hub
Policy Acknowledgement
Policy Feedback
Policy Admin
Policy Approvers

Resources

Company Logos + Images
Document Templates
Marketing Collateral

People

HR
3 Most Asked: Absence & Leave
New Joiners

G
Bu
ISC
Ris
Ve

⌄**AND**/OR

Search a value... **4**

☐ Policy

Apply   Clear

Department ⌃

⌄**AND**/OR

Search a value...

☐ HR

📄 **Employee Handbook – Special Leave Policy & Procedure**

Megan Bowen January 19, 2022

details of the Company's policy towards special **leave** which falls outside the scope of all other types of **leave** already provided for in this Employee Handbook ...

🏷 HR Policy Absence and Leave

📄 **Employee Handbook – Holiday Policy**

Megan Bowen January 19, 2022

The rules on accrual of annual **leave** may mean that the employee has not, at the time that **leave** is to be taken, accrued such length of **leave** to cover their holiday ...

🏷 HR Policy Absence and Leave

Navigation (3) takes users to a curated search results page (4)

Human Resources

☆ Not following   ↪ Share

+ New ∨   ↪ Send to ∨   📢 Promote   ⚙ Page details   🔊 Immersive Reader   📊 Analytics

Published 25/01/2022   ✏ Edit   ⤢

Welcome to Contoso

Patti Fernandez
President

Pages, such as this New Joiner page automatically refer to the current Policy in force

Let's Get Started

If it's your first day today, we'd just like you to know how happy we are to have you with us :)

To give you an idea of what to expect from your on-boarding, we have written this short guide. It covers the things that we think are important for new starters and we hope it provides a basis for your successful on-boarding.

Over the next few days and weeks we'll introduce:

1. **Company mission, values, business services and EOSs** - We'll talk about our mission and why the business exists. We'll tell you why we think it's important to improve software delivery in every organisation and how you can help us to achieve our mission.
2. **Peer buddy** — As part of our on-boarding process, we'll introduce you to a company buddy who will be available whenever you need them. If anything crops (from simple questions to emergencies), feel free to let your buddy know and they will do all they can to help.
   It goes without saying that myself and the other directors (+ rest of the team) are here too, so there should be plenty of places to turn if you need anything.
3. **Role expectations** — All our team members have role expectations and we'll work with you to introduce these to you over the coming weeks.
4. **Career development 121s** — As part of your on-boarding process and ongoing career development, you'll have a monthly 121 with your Line Manager or one of the company directors. These sessions are an opportunity for us to review your progress, look at areas where we can provide support.
5. **Marketplace** — Every Friday at LearnTech, we run a several learning sessions which we share on a Marketplace. The idea behind this is to share learnings from across the company to look at how we can improve. Please contribute to these and once you're feeling confident enough, look to

2. **Peer buddy** — As part of our on-boarding process, we'll introduce you to a company buddy who will be available whenever you need them. If anything crops (from simple questions to emergencies), feel free to let your buddy know and they will do all they can to help.
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6. **Salary, Pensions & Expenses** — We'll take you through how our finance work, where to go to if you have any or if you need to submit an expense claim / get a company credit card.

Pages, such as this New Joiner page automatically refer to the current Policy in force

Week 1 Reading

First this - Week 1 Reading!

See all

5

Employee Handbook – Expenses Policy and Procedure	Employee Handbook – Flexible Working	Employee Handbook – Holiday Policy	Employee Handbook – Sickness Absence Policy and Procedure

Policies

Employee Handbook – Expenses Policy and Procedure

Megan Bowen
Edited 25 Jan 2022

Policies

Employee Handbook – Flexible Working

Megan Bowen
Edited 24 Jan 2022

Policies

Employee Handbook – Holiday Policy

Megan Bowen
Edited 19 Jan 2022

Policies

Employee Handbook – Sickness Absence Policy and Procedure

Megan Bowen
Edited 19 Jan 2022

INFORMATION EXP

Policies   Edit

+ New ⌄   ⚙ Page details   📊 Analytics

leave   ✕ →

6

Search Filters

Type ⌃

🔽 **AND**/OR

Search a value...

☐ Policy

Apply   Clear

Department ⌃

🔽 **AND**/OR

Search a value...

☐ HR

Apply   Clear

Keywords ⌃

🔽 **AND**/OR

Search Results

📄 **Employee Handbook – Shared Parental Leave**

Megan Bowen January 19, 2022

may make up to three requests for **leave**, including any changes to previously booked **leave** • a request for a continuous period of **leave** becomes ...

⊘ HR Policy Family Leave

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Megan Bowen January 19, 2022

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⊘ HR Policy Absence and Leave

📄 **Employee Handbook – Paternity Leave and Pay**

Megan Bowen January 19, 2022

: • within a period of 56 days ... wish to change the date of your paternity **leave** after giving notice, you must provide an additional written notice requesting a variation to the **leave** ...

⊘ HR Policy Family Leave

Search experience uses filters (or refiners) to give an Amazon style user experience

4. Acknowledge

1

Through a Power App – we can capture users acknowledging or attesting that they understand and accept a policy

5. Feedback

1

Submit Feedback

* Title

[   ]

Policy

[Find items   ▾]

Feedback Type

[Regulatory Change   ▾]

Description

[   ]

2

Feedback Type

[Find items   ]

Clarity

Business Change

Regulatory Change

Non-Conformity

Through mobile friendly forms we can capture different types of feedback and invoke a review workflow

Different views of Feedback allow reviewers to have an all up view and authors just to see their data

3

Feedback ☆

	Title ⌄	Status ⌄	Policy ⌄	Feedback Type ⌄	Description ⌄	Date Raised ⌄	Response ⌄
⌄	**Status : 1. Open (1)**						
	Can I use an iPad mini for email?	1. Open	[IEXP-IS-P-02] Employee Handbook – Bring your own Device Policy.docx	Clarity	Thank you	20/01/2022	
⌄	**Status : 2. Pending (1)**						
	What constitutes a device	2. Pending	[IEXP-IS-P-02] Employee Handbook – Bring your own Device Policy.docx	Clarity	Are smart watches covered by the BYOD policy, I fear they may be a security risk	19/01/2022	Further clarity will be added in the next update of this policy.
⌄	**Status : 4. Closed (1)**						
	Update on Vaping	4. Closed	[IEXP-HR-P-10] Employee Handbook – Smoke-Free Policy.docx	Business Change	Policy needs to reflect Vaping in the office garden	20/01/2022	

6. Review

1

Submit Feedback

* Title

Excessive Christmas Gifts

Policy

[IEXP-CP-P-03] Employee Handbook – A ⌄

Feedback Type

Non-Conformity ⌄

Description

Gifts to ABC corp appear to be in breach of our policy?

2

Document Number ⌄	Owners (DMS) ⌄	Next Review Date ⌄
IEXP-IS-P-02	Allan Deyoung	→ 31/12/2022
IEXP-IS-P-01	Allan Deyoung	⊗ 31/12/2021
IEXP-IS-T-01	Allan Deyoung	ⓘ 18/02/2022

Trigger policy reviews based on time passed (1), or based on an event such as a "Non-Conformity" report (2)

3

Controlled Documents Due To Expire

Megan Bowen
Thu 1/20/2022 2:00 AM

To: Megan Bowen

Hello,

The following Controlled Documents, where you have been identified as the owner, expire within 30 days:

- Letter Template
- Simple Template
- Employee Handbook – Flexible Working

Review these documents

Thank you

Compliance Team

Note: If you have questions, or believe that you are not the correct owner, you can email compliance@constoso.com

Reply | Forward

Alert policy owners where they work, by email (3) or in Microsoft Teams (4)

4

Megan Bowen via Power Automate   20/01 10:01

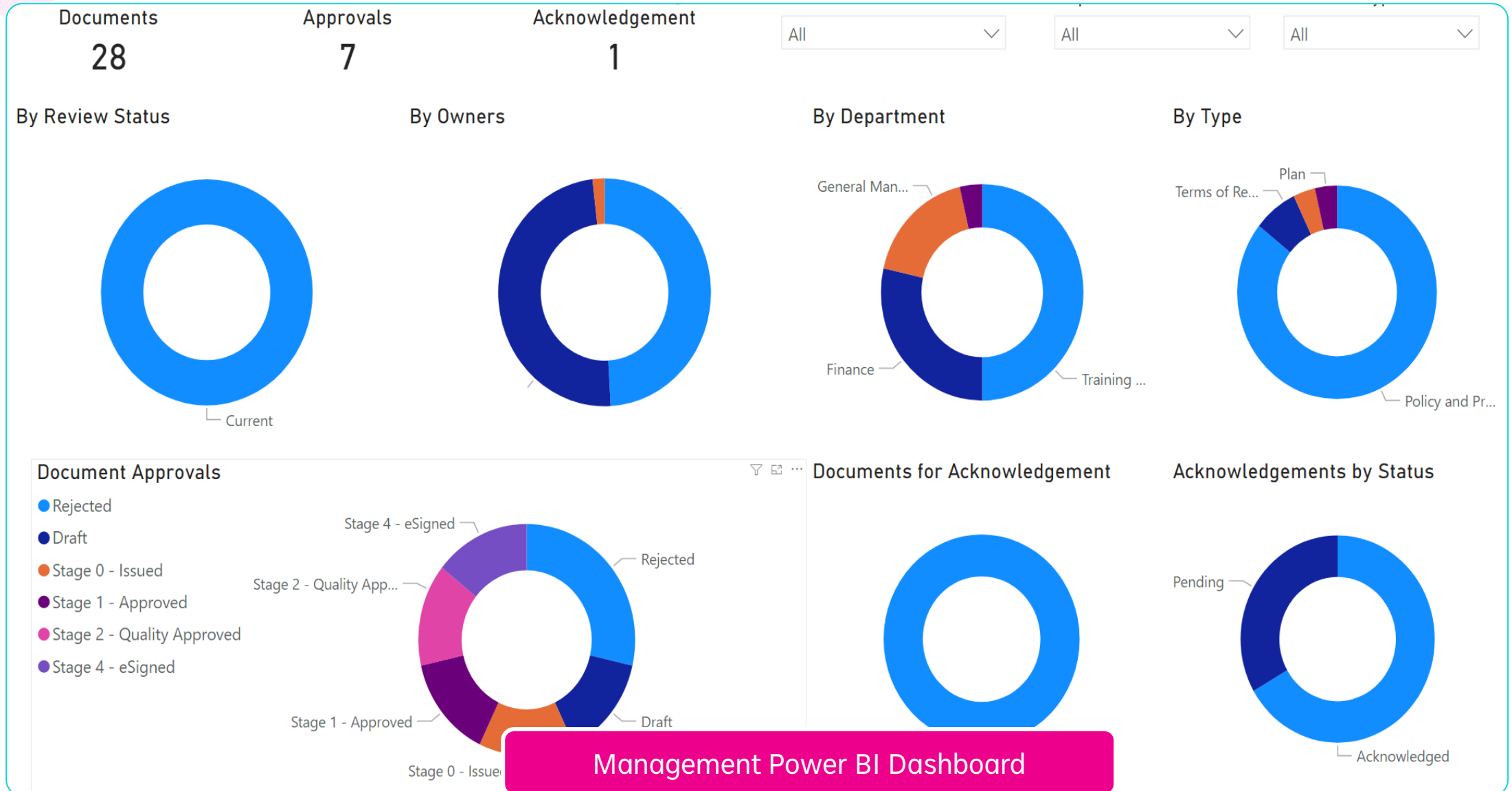**Controlled Documents Due To Expire**   ⚠️ Pending

The following Controlled Documents, where you have been identified as the owner, expire within 30 days:

Title: Letter Template
Title: Simple Template
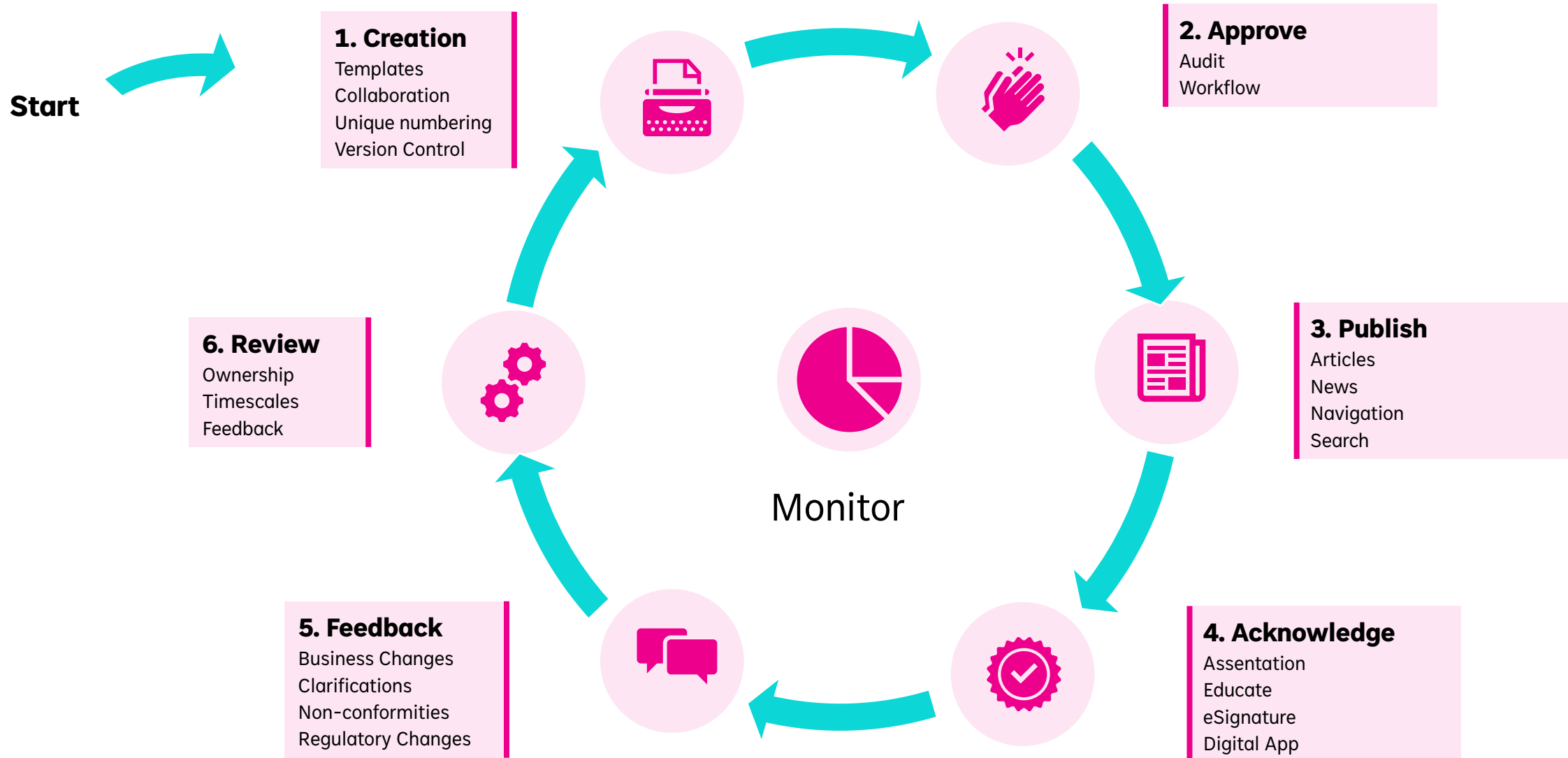**Title:** Employee Handbook – Flexible Working

Review these documents   Help

7. Monitor

Management Power BI Dashboard

Policy Life Cycle

Start

1. Creation
Templates
Collaboration
Unique numbering
Version Control

2. Approve
Audit
Workflow

3. Publish
Articles
News
Navigation
Search

4. Acknowledge
Assentation
Educate
eSignature
Digital App

5. Feedback
Business Changes
Clarifications
Non-conformities
Regulatory Changes

6. Review
Ownership
Timescales
Feedback

Monitor

information exp

Ready to take the next step?

ANY QUESTIONS, GET IN TOUCH WITH US...

0330 133 2434 | hello@informationexp.com | Book a Meeting