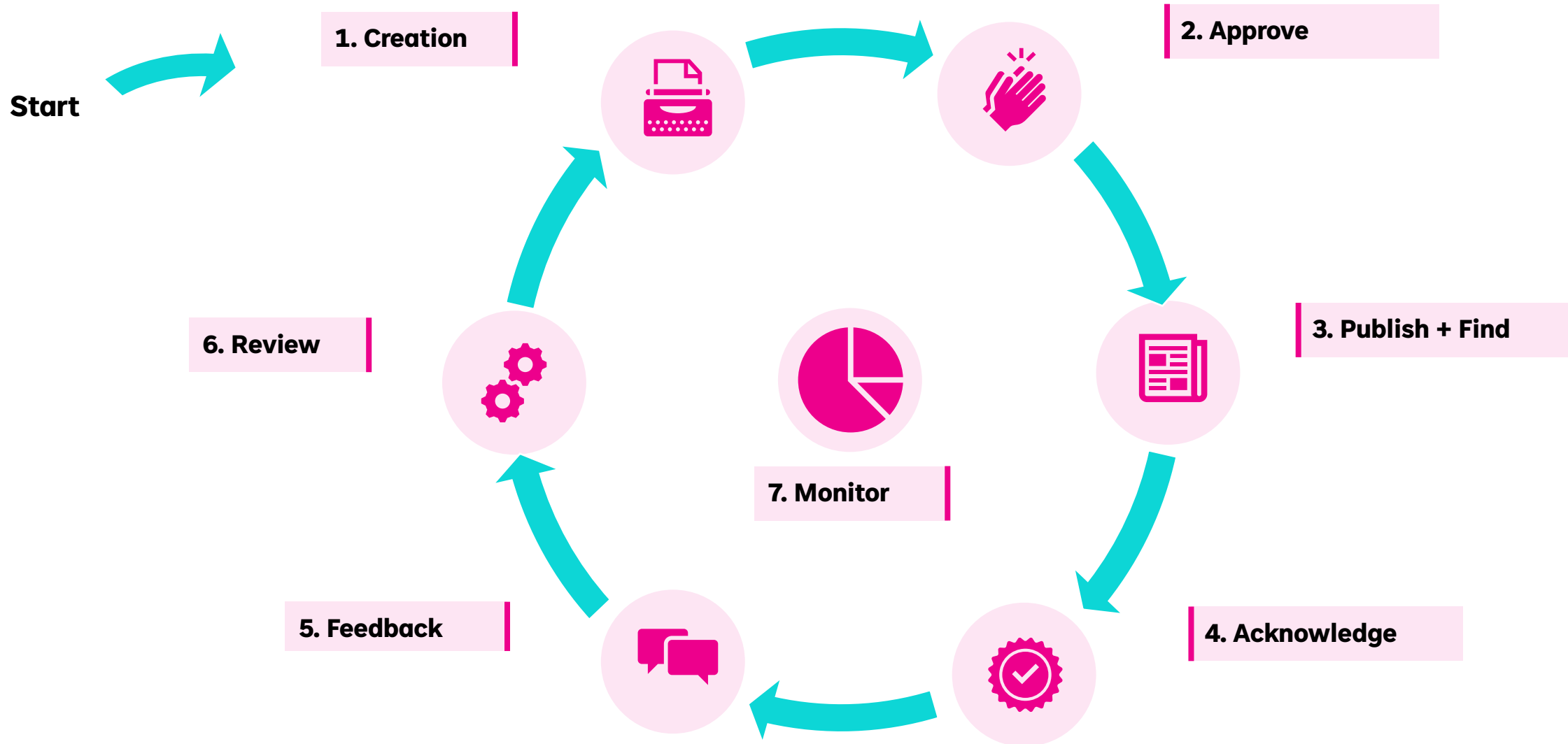




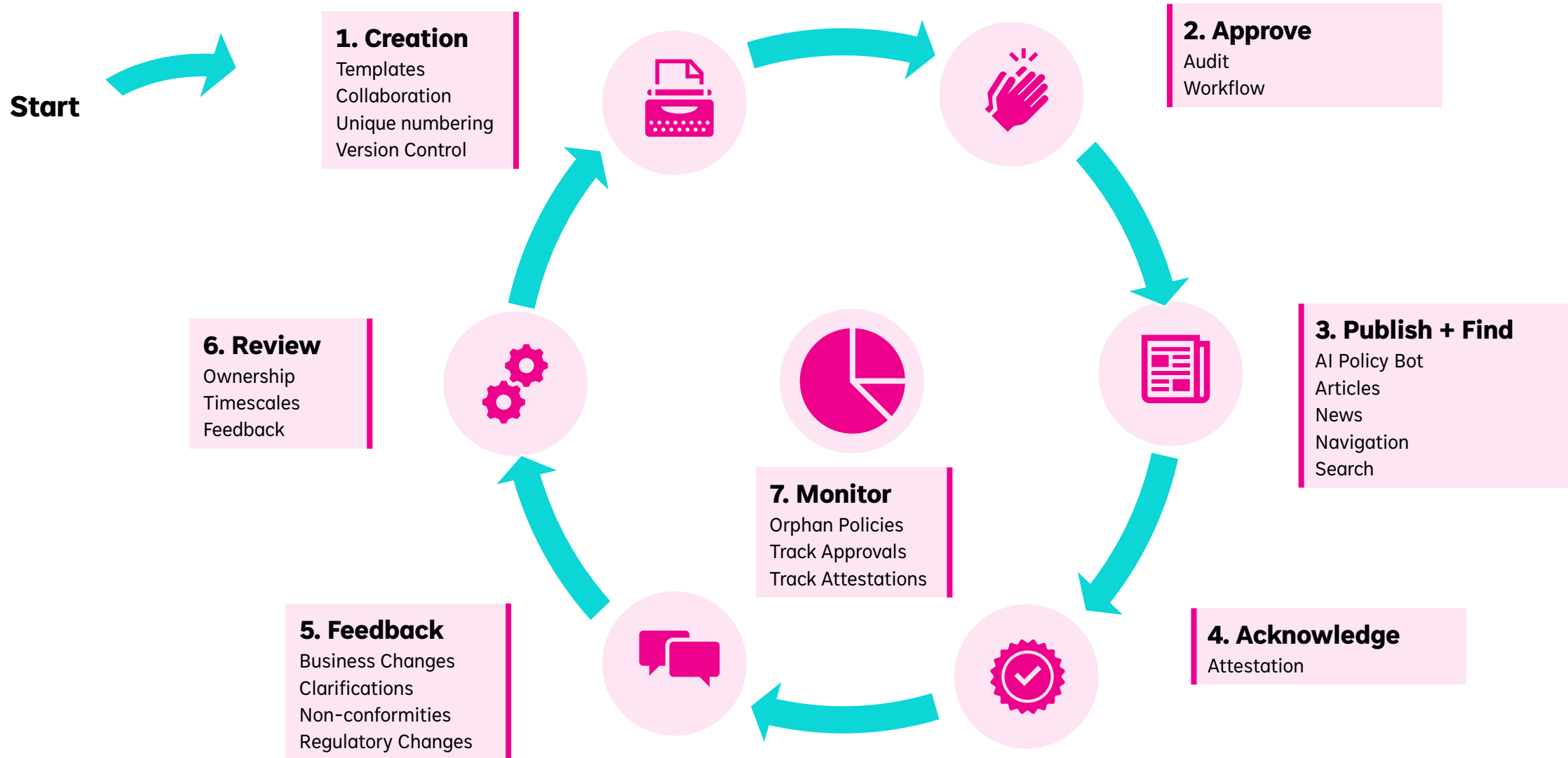
Policy Express for Microsoft 365

Explore • Explain • Experience • Expand • Expert

Policy Life Cycle



Policy Life Cycle



1. Creation



Policy Templates

Publish and start from templates in the Policy Hub or drag-and-drop existing policies



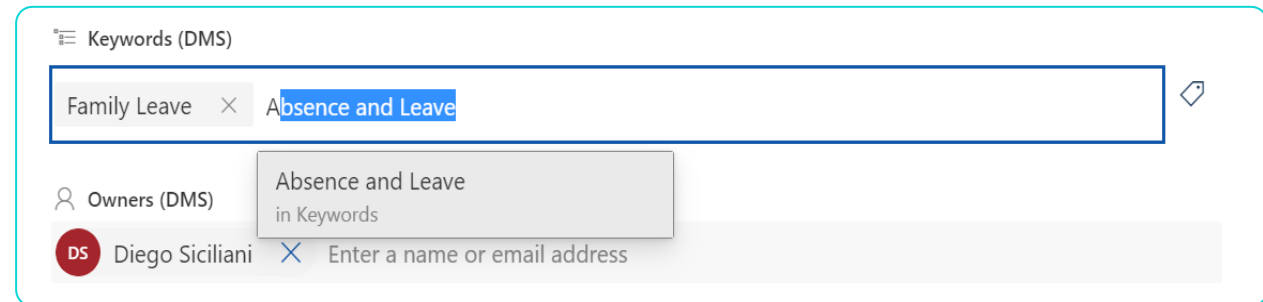
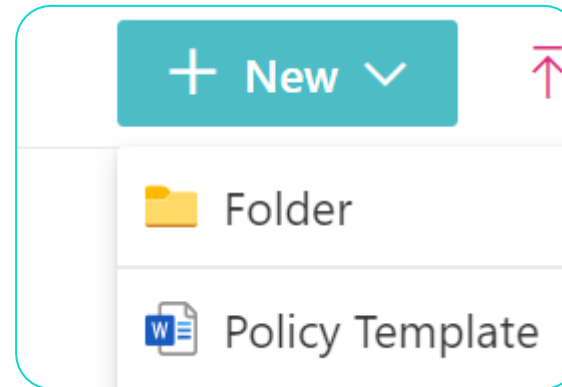
Tag and Categorise

Configured taxonomy to reflect your organisation



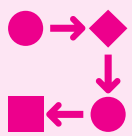
Unique Reference

Automatic numbering for each document



Name	Document Number	Department ...
Employee Handbook – Data Protection.docx	IEXP-CP-P-02	Compliance
Employee Handbook – Whistleblowing Policy.d...	IEXP-CP-P-01	Compliance

2. Approve



Approval Process

Stage 1: Assign first approver

Stage 2: Optionally assign to second approver

Stage 3: Optionally log Board/Committee approval

Stage 4: Convert to PDF & Publish to Hub



Audit

Each action is logged by time & user

Send For Approval / Publish



- First Approval
- Second Approval
- Auto Publish

Approval Action

Send for Approval:

Equality, Diversity and Inclusion.docx

Approver(s):

Amelia B, Chloe A

Second Approver(s):

Rupert S

Send for Approval

Questions?

- Contact [Rupert](#)



Full Breakdown of Approval Process follows in this handout

3. Publish + Find



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

1. EXPENSES POLICY AND PROCEDURE

1.1. Introduction

The Company's policy on expenses is to ensure that all employees are aware of the rules and procedures for claiming expenses. This policy is designed to ensure that all expenses are claimed in a timely and accurate manner.

Policies

Employee Handbook – Expenses Policy and Procedure

Megan Bowen
Edited 25 Jan 2022

1. FLEXIBLE WORKING

1.1. Introduction

The Company's policy on flexible working is to ensure that all employees are aware of the rules and procedures for requesting flexible working. This policy is designed to ensure that all requests are considered in a timely and accurate manner.

Policies

Employee Handbook – Flexible Working

Megan Bowen
Edited 24 Jan 2022

1. HOLIDAY POLICY

1.1. Introduction

The Company's policy on holiday is to ensure that all employees are aware of the rules and procedures for requesting holiday. This policy is designed to ensure that all requests are considered in a timely and accurate manner.

Policies

Employee Handbook – Holiday Policy

Megan Bowen
Edited 19 Jan 2022

1. SICKNESS ABSENCE POLICY AND PROCEDURE

1.1. Introduction

The Company's policy on sickness absence is to ensure that all employees are aware of the rules and procedures for requesting sickness absence. This policy is designed to ensure that all requests are considered in a timely and accurate manner.

Policies

Employee Handbook – Sickness Absence Policy and Procedure

Megan Bowen
Edited 19 Jan 2022


3. Publish + AI



Policy Bot
Natural Language
AI Search


 **Rupert S**

what is our annual leave policy in 5 bullet points and no more than 100 words

 **Bot**

Here are five key points from the annual leave policy:

1. **Annual Leave Entitlement:** Employees must retain enough days to cover any company shutdown periods [1].
2. **Leave Approval:** All leave must be pre-authorized via the company's online system [1].
3. **Public Holidays:** Employees may need to work on public holidays and will receive a day's leave in lieu [1].
4. **Untaken Leave:** Generally, untaken leave cannot be carried forward unless approved by a Director [2].
5. **Holiday Pay:** Employees will receive their normal pay during annual leave [1].

1  **Employee Handbook – Absence, Leave and Flexible Working.pdf**

¹ AI Search requires an Azure Subscription and Success Service Contract

4. Acknowledge



Assign

Define your audience by group or individual



Attest

Assignees acknowledge the document within the browser



Track

Report on signing status

✓ Document Acknowledgement - Enterprise Policy Framework

Documents for Review

Document	Version	Due Date
Travel Policy.pdf	1.0	31/12/2024
Environmental Policy.pdf	1.0	31/12/2024
Equality, Diversity and Inclusion.pdf	1.0	31/12/2024

Document: Equality, Diversity and Inclusion.pdf

Open in New Window

🔍 ⬆️ ⬆️ 1 / 20 ⬆️ ⬆️

Resolving Issues in the Workplace - Equality, Diversity and Inclusion

Policy: Resolving Issues in the Workplace - Equality, Diversity and Inclusion

Reference	IEXP-HR-P-0002	Author	Rupert Squires
Category	HR	Approved By (2)	Ben L
Approved By	Ben L	Approved Date (2)	[Approved Date (2)]
Approved Date	[Approved Date (1)]	Approved Date (2)	[Approved Date (2)]

1 Policy Statement

1.1 Introduction

We are an equal opportunities employer. We are committed to equality of opportunity and to providing a service and following practices which are free from unfair and unlawful discrimination. The aim of this policy is to ensure that no applicant or member of staff receives less favourable treatment on the grounds of age, disability, gender reassignment, marriage and civil partnership, pregnancy or maternity, race, religion or belief, sex or sexual orientation, or is disadvantaged by conditions or requirements which cannot be shown to be relevant to performance. It seeks also to ensure that no person is victimised or subjected to any form of bullying or harassment.

☐ 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

Document Feedback

Provide Feedback

Submit

* Priority

High

* Feedback Type

Find items

* Feedback

I notice we have mentioned solar power?

Attachments

There is nothing attached.

Attach file

Document: BCorp Policy.pdf

Open in New Window

1 / 2

Policy: BCorp Policy

Reference	IEXP-CP-P-0006	Version	1.2
Approved By	Rupert S	Approved Date	30/07/2024

1 Purpose

The purpose of this policy is to outline our commitment to the principles and standards of a Certified B Corporation (B Corp). This policy aims to ensure that our business practices align with the B Corp values of social and environmental performance, accountability, and transparency.

2 Scope

This policy applies to all employees, departments, and stakeholders of [Company Name] who contribute to and support our B Corp objectives and commitments.

3 Definitions

B Corporation (B Corp): A certification for businesses that meet the highest standards of verified social and environmental performance, public transparency, and legal accountability.

Stakeholders: Individuals or groups that are affected by or have an interest in the operations and decisions of [Company Name], including employees, customers, suppliers, community members, and shareholders.

4 Policy Statement

4.1 Rules and Guidelines

- Social and Environmental Performance:** Commit to continuous improvement in our social and environmental impact, ensuring our operations and practices benefit all stakeholders.
- Accountability:** Hold ourselves accountable to the highest standards of business ethics and corporate governance.

6. Review



Assign

Each controlled document has an assigned owner or owners



Reminders

A sequence of reminders sent to the owner(s) prior to the review date.



Feedback

Consolidated feedback for the controlled 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



Document Masters							
	Name	Document Number	Department	Next Review Date	Owners (DMS)	Type (DMS)	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

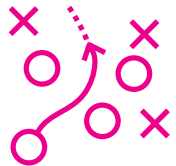
Feature List



Stage	Feature	Included
Creation	Templates: Policy Templates appear in SharePoint	✓
	Classification: Department, Document Type and Keywords + Your Fields	✓
	Policy Identification: Unique Numbering	✓
Approval	1 & 2 Stage Approvals: Optionally restrict to known users	✓
	Audit Trail: Approval History	✓
	Delegated Approval: Committee & Board Approval	✓
	Non-material change: For quick publishing	✓
Publishing	PDF: Optional Auto-Conversion to PDF	✓
	Policy Hub: Navigation, Text and Filtered Search	✓
	AI Search: Policy Bot and News Agent ¹	✓ ¹
Acknowledgement	Policy Attestation: Employees to attest/acknowledge assigned policies	✓
	Attestation Reporting: Acknowledged and outstanding	✓
Feedback	Feedback Capture: Amends and Clarifications	✓
Review	Review Reminder: Expiring Policy Owner Notification emails	✓
	Administration Report: Expiring Policies View	✓
	Aggregated Feedback: For Policy Owners	✓
Monitor	Management Dashboard: Chart view ²	✓ ²
	Orphan Policies: Ownership report mapped to Microsoft 365 licenced users	✓

¹ Requires Azure AI + Success Service Contract | ² Requires Power BI Licence

Success Service



INCIDENTS

Guidance
Minor Modifications ¹
Solution support



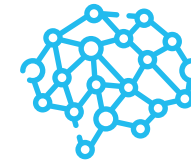
TRAINING

Administrator Training ²
Policy Owner Training ²



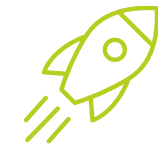
ENHANCEMENTS

New Features



AI

News Agent
Policy Bot



QUARTERLY REVIEWS

Microsoft Updates
Technology Trends
Service Health
Solution Updates

Reactive

Planned

Service

Proactive

¹ Unlimited 30-minute calls with up to two named users | ² Three sessions per year in total

Financial investment



Solution Investment

Solution	Cost
Policy Express Packaged Solution <ul style="list-style-type: none">• Deployment• Configuration• Training• Lifetime Perpetual License for Standard Features	£10,950 / US\$13,950

On-Going Investment ¹

Expert Success	Investment (Monthly)
<ul style="list-style-type: none">• Expert Success Service – Express	£250 / US\$325
<ul style="list-style-type: none">• Additional Power Users (2 included) @ £50 / US\$60 per user per month	
<ul style="list-style-type: none">• Required for AI Features	

¹ Only required for Year 1 | Expert Success runs on a 12-month contract



Policy Express Deployment



Engagement Plan



**Demo and
Q&A**



**Technical
Validation**



**Contract
Signed**



Week	Activity	Detail	Who
1	Kick Off Call	Planning call with our Project Manager.	Joint
1-2	M365 Environment Setup	Guided tenant setup for solution installation.	Joint
2	Solution Workshop	Two-hour workshop to agree configuration.	Joint
3	Solution Deployment	Deployment, configuration, and testing of the solution.	Us
4	Solution Playback	Walkthrough of your configured solution.	Joint
Success Service Starts			
5+	Training	Owner + Approver Training. Solution Administrator Training.	Joint
5+	Content Population	You to add your content supported by our success Service	Joint
5+	Launch	Users can now easily access the policies they need.	You

Why Policy Express?



Benefits

1

Functionality

- Automates **data-driven approval workflows**.
- Includes powerful **search, acknowledgment, and feedback** features.
- Provides **management dashboards** to monitor compliance.

2

Platform

- Seamlessly **integrates with your existing Microsoft 365 environment**.
- Ensures all your **data stays within your tenant**.

3

Fully Inclusive

- One fixed fee includes a **perpetual licence** for all standard functionality.
- Covers **deployment, configuration & training**.

4

Support

- **Expert Success** service provides ongoing peace of mind, including **future updates**.
- Required only for Year 1.
- Includes AI features such as **Policy Bot**, and **News Agent**.

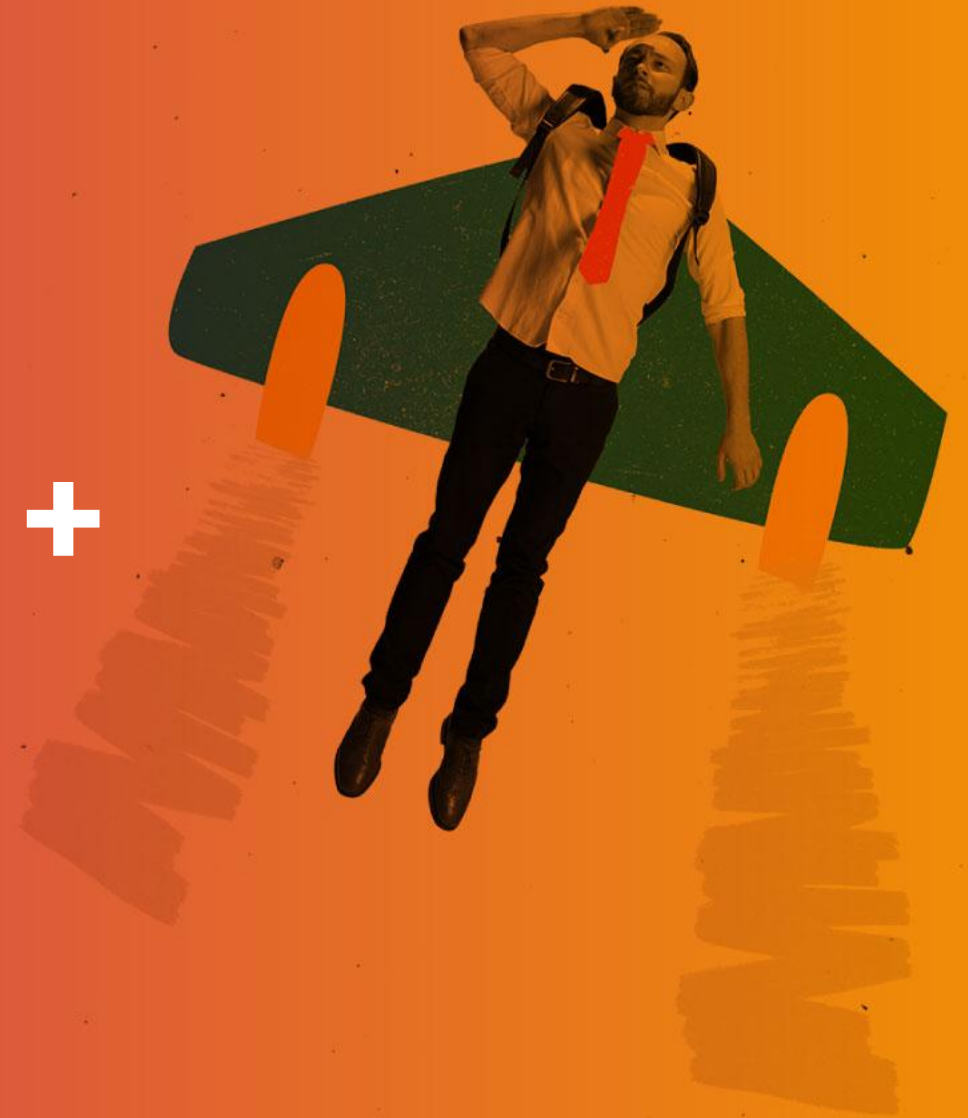
Commercial

Deep Dive

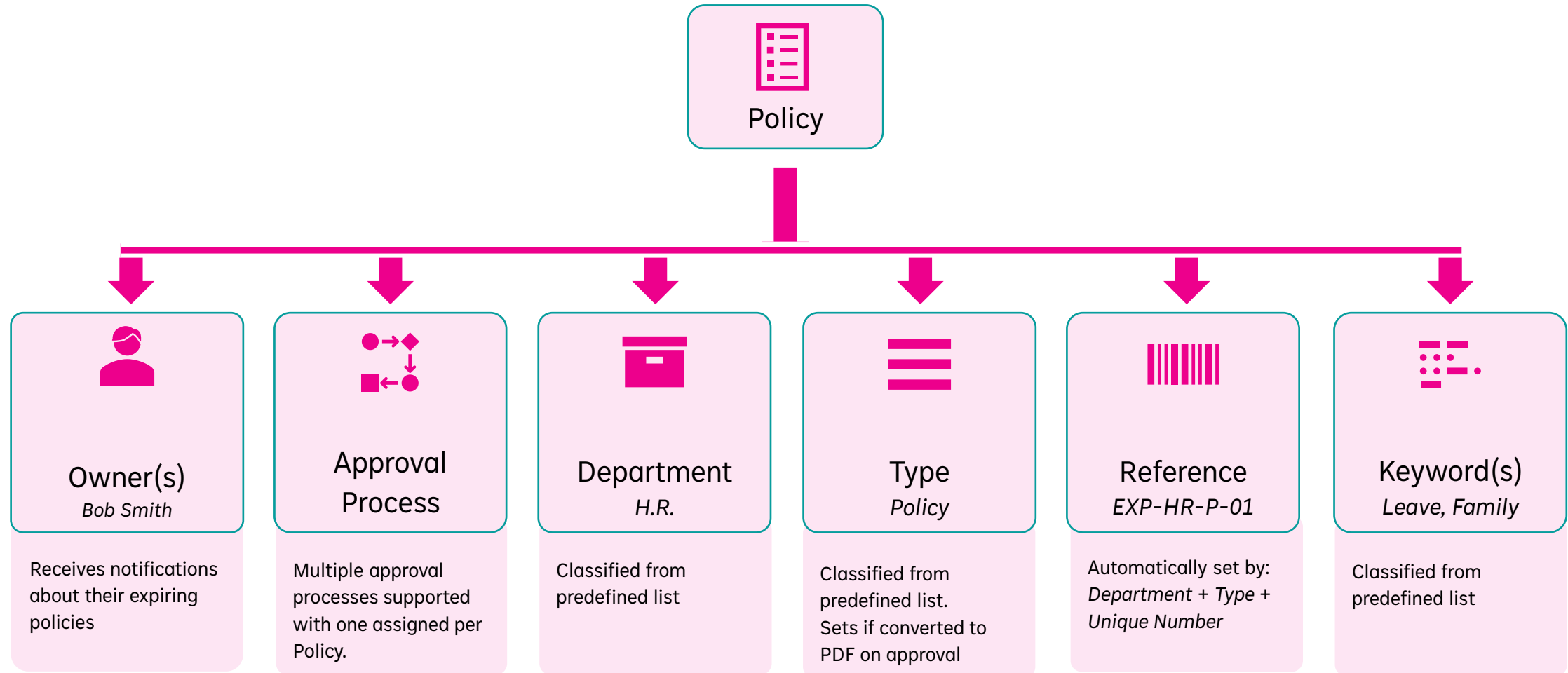


Policy Classification + Approval Process

Classification | Approval Process Steps



Understanding Policy Classification



Additional fields can be added to reflect your classification needs

Approval Process Scenarios



SME Approval Process (Subject Matter Expert)

- Where the person, or group of people, who approve policies are known in advance
- Groups are set for each department and each approval step



Freeform Approval Process

- Where the approver(s) are not known in advance
- The user is empowered to select the right person(s) in the organisation



Delegated Approval Process

- Where the requestor is approving the process on behalf a board / committee
- Can be added to either of the SME or Freeform processes or be standalone



Non-Material Change Approval Process

- No formal approval process required
- Can optional push out next review date

The Delegated Approval Process can be appended to the both the SME and Freeform Approval Processes

SME Approval Process



Step 1: SME Approval

- Requestor assigns to one or many 1st Level Department Approvers
- Configured as “First Approves” or “Everyone must approve”

Step 2: SME Approval (Optional Step)

- Either
 - User assigns to one or many of the predefined Approvers
 - Automatically goes to all predefined Approvers
- Configured as “First Approves” or “Everyone must approve”

Step 3: Delegated Approval / Board Approval (Optional Step)

- User approves the policy on behalf someone else
- Date and “behalf” data is collected

Step 4: Automatically Publish

- At a “Document Type” level, documents can be selected to be automatically converted to PDF before publishing
- The Finalised Document is now published to the Policy Hub



Freeform Approval Process



Step 1: Freeform Approval

- Requestor assigns to one or many Approvers selected from the employee directory
- Configured as “First Approves” or “Everyone must approve”

Step 2: Freeform Approval (Optional Step)

- Requestor assigns to one or many Approvers selected from the employee directory
- Configured as “First Approves” or “Everyone must approve”

Step 3: Delegated Approval / Board Approval (Optional Step)

- User approves the policy on behalf someone else
- Date and “behalf” data is collected

Step 4: Automatically Publish

- At a “Document Type” level, documents can be selected to be automatically converted to PDF before publishing
- The Finalised Document is now published to the Policy Hub



Delegated (Manual) Approval Process



Step 1: Delegated Approval / Board Approval

- User approves the policy on behalf someone else
- Date and “behalf” data is collected

Step 2: Automatically Publish

- At a “Document Type” level, documents can be selected to be automatically converted to PDF before publishing
- The Finalised Document is now published to the Policy Hub



Non-Material Change Approval Process



Step 1: Non-Material Change Approval

- User approves the policy with comments
- Optionally the next review date is updated

Step 2: Automatically Publish

- At a “Document Type” level, documents can be selected to be automatically converted to PDF before publishing
- The Finalised Document is now published to the Policy Hub





Ready to take the next step?



ANY QUESTIONS, GET IN TOUCH WITH US...

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