

How to Schedule Effective Date

Normally, a policy becomes active as soon as the final Approver marks their approval. However, you can also schedule a policy to become active in the future. A Scheduled Effective Date can be used to set a delay between a pending status and the policy becoming active.

Setting an Effective Date is done on the policy's properties tab. Choose to delay by a number of days following the final approval or select a specific date for the policy to become active.