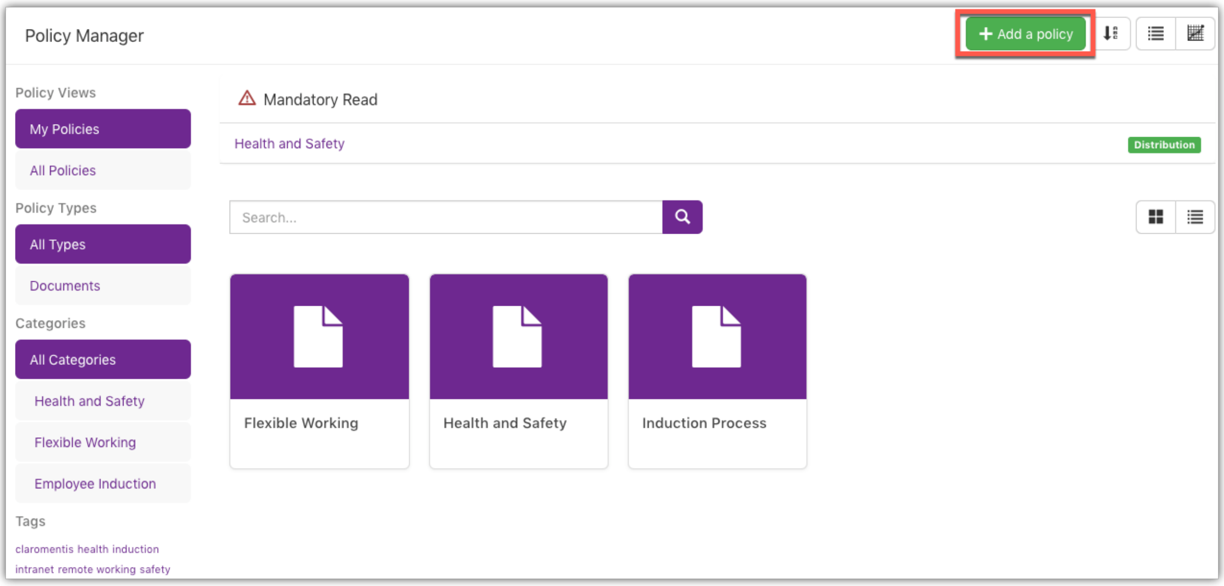
Link to article: https://discover.claromentis.com/knowledgebase/articles/493

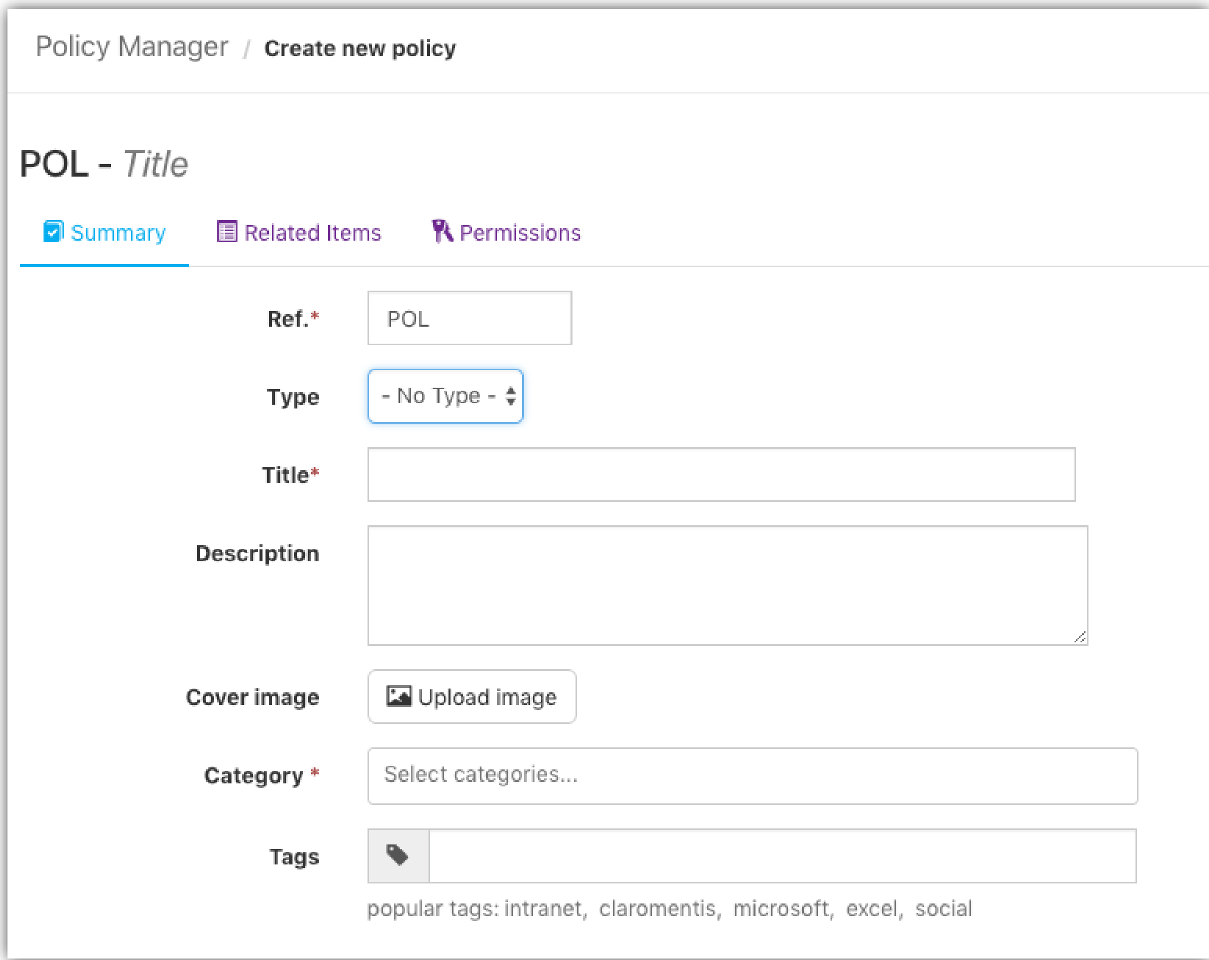
How to Create a New Policy

by Michael Hassman on 13 November 2018

With the permissions to create a policy in at least one category you will be able to see the create policy button from the front end of the Policy Manager Application



This will take you to the policy creation page where you will be required to fill our various fields such as the polices reference, it's type, channel title and any searchable tags. These are fairly standard requirements for a lot of Claromentis content.



However after adding this content you will then be asked to choose your 'Asset Type' which is the policy you wish to add. There are mutiple options for you to choose here depending on how you wish to present the policy.

The options are:

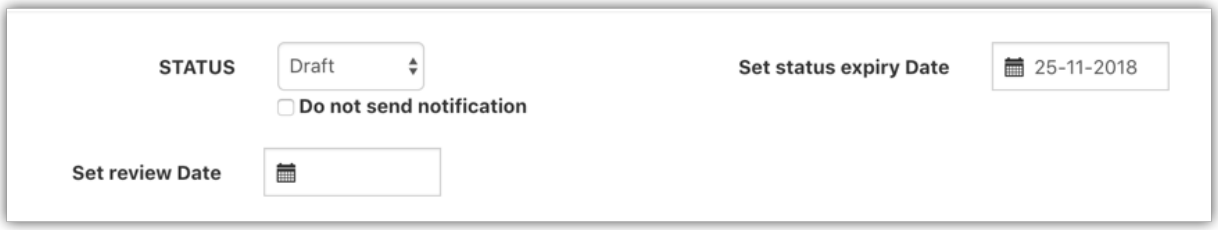
File Upload - Allowing the user to upload a pre-existing policy from their local machine and upload it directly to the policy manager

Page - Opening up the CK editor this option will allow a user to typre a new policy directly into the application and have the content readable direcly within the policy.

File From Documents - This option allows the user to link a doucment already stored in the document management system and allow for this to be accessed through the policy manager.

Weblink - Selecting this option will make a link field appear allowing yout to link the policy to an external website

Once you have selected your desired asset type you will then be presented with the status options for your policy



From here, you can choose to state what status the policy should be in. At this time it is most likely the policy will be placed in the draft status however, if you have created a variety of approval statuses through the admin area you can set this to one of the approval statuses if you are already happy with the content and imediately want to move this on for others to approve.

You can also set an expiry date for your current status allowing you to configure a reminder based to update the status setting deadlines for each stage of the approval workflow.

The last option avaiable in this section is to set up a review date. This is more of a general date for the policy overall rather than the status expiry and should be set to a much larger time frame. Once more this sends a reminder notification but is intended for you to review the policy and see if it needs updating.

Just before creating your policy you will also have the option to change both the owner and author of the policy. Just incase you are adding this to the intranet on their behalf, though both of these fields will defualt to the creator of the policy.

You can also adjust some final aspects of the policy by accessing the related items and permissions tabs at the very top of the page

These will allow you to link to other polices or external sources and adjust the permissions of this specific policy respectively.

With all this inplace you can hit submit at the very bottom of the screen to create the policy.