



Create a New Policy in Policy Manager

Overview

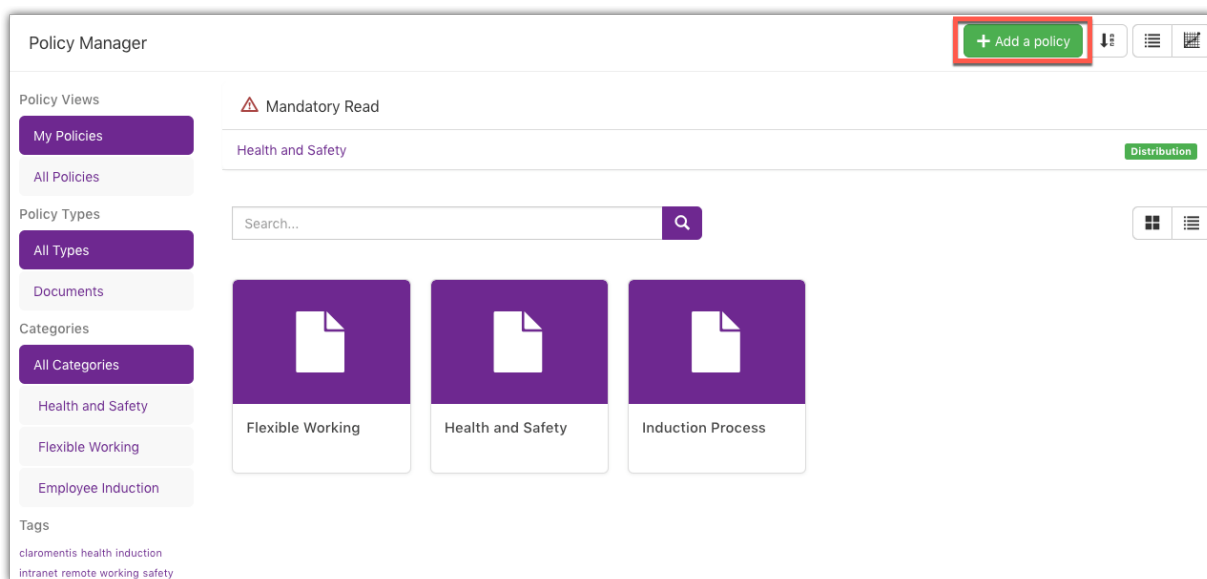
In this article, we will look at creating a new policy from the Policy Manager application.

The information below is outlined in the video.

Your browser doesn't support video.
Please download the file: [video/mp4](#)

Step: 1 Add a policy

With the permission 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, its type, channel title and any searchable tags. These are fairly standard requirements for a lot of Claromentis content.

Step 2: Populate fields

Policy Manager / Create new policy

POL - Title

Summary Related Items Permissions

Ref.*

Type

Title*

Description

Cover image

Category *

Tags

popular tags: intranet, claromentis, microsoft, excel, social

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 multiple options for you to choose from 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 type a new policy directly into the application and have the content readable directly within the policy.
- **File From Documents** - This option allows the user to link a document 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 you to link the policy to an external website

Step 3: Set Status

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

A screenshot of a web interface for configuring a policy's status. It features a 'STATUS' dropdown menu currently set to 'Draft'. Below it is a checkbox labeled 'Do not send notification'. To the right, there is a 'Set status expiry Date' field with a calendar icon and the date '25-11-2018'. At the bottom left, there is a 'Set review Date' field with a calendar icon.

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 immediately want to move this on for others to approve.

Once a policy is moved to 'distribution' status it is live and can be found by users with view permissions on the front end.

Step 4: Further Options

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 available 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 in case you are adding this to the intranet on their behalf, both of these fields will default to the creator of the policy.

Step 5: Set Correct Permissions

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.

A screenshot of the 'Policy Manager / Create new policy' interface. At the top right, there is a green '+ Add a policy' button and several utility icons. Below the header, the title 'POL - Title' is displayed. A navigation bar contains three tabs: 'Summary' (selected), 'Related Items', and 'Permissions'. The 'Related Items' and 'Permissions' tabs are highlighted with red boxes. Below the tabs, there are three input fields: 'Ref.*' with the value 'POL', 'Type' with a dropdown menu set to '- No Type -', and 'Title*' which is currently empty.

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

When a policy is moved to the 'distribution' stage a notification will be sent to all users in the 'target distribution' letting them know it's ready to be accepted.

Step 6: Submit The Policy

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

Draft Policies are not visible from the main page, navigate to **Manage Policy** to see policies in **status: Draft**

+ Add a policy



Manage Policies

Last modified on 1 December 2023 by [Hannah Door](#)

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