Link to article: https://discover.claromentis.com/knowledgebase/articles/493/policy-manager-creating-a-new-policy

Policy Manager: Creating a new Policy

Users with permission to create policies can do so from the front end of the application.

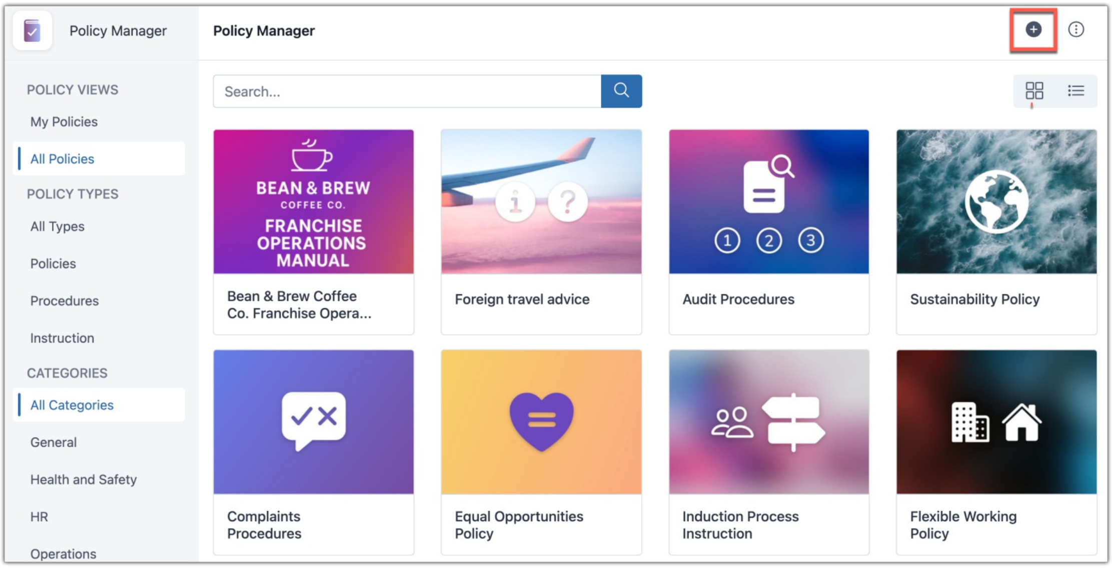
Considerations about how the content will be created in the Intranet and permissions need to be made by your team.

Over time, policy content builds up in the application and is managed by administrators.

Follow this guide to understand how to create a new policy.

Step 1: Create policy

On the front end of the Policy Manager application, click the 'Add policy' button:



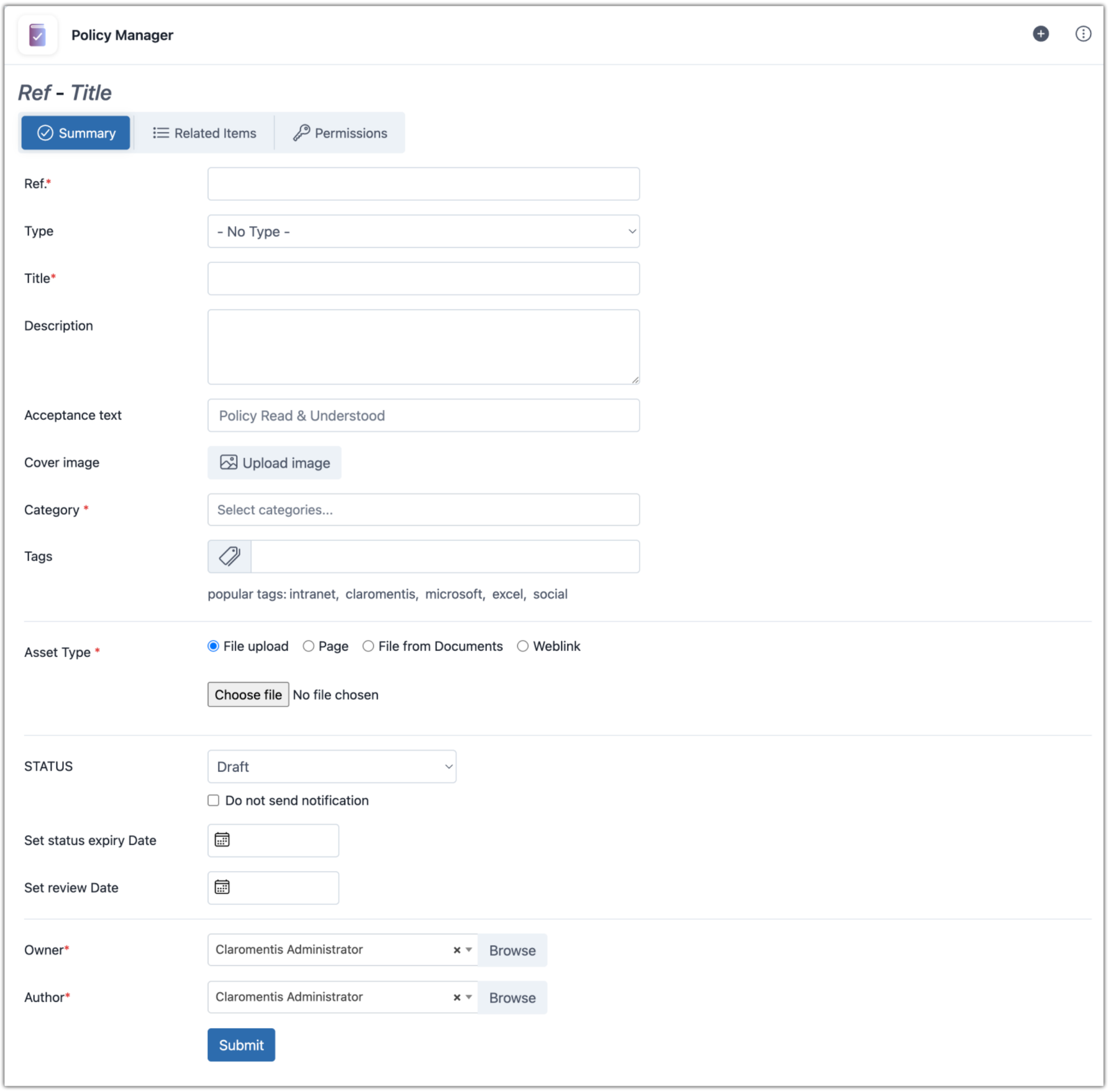
The 'Add policy' button will appear to users with permission to create a policy in at least one category.

These permissions are set on the admin side by policy administrators.

Step 2: Populate all relevant fields

The Policy creation screen will open.

Fill out all fields relevant to the policy you are creating:

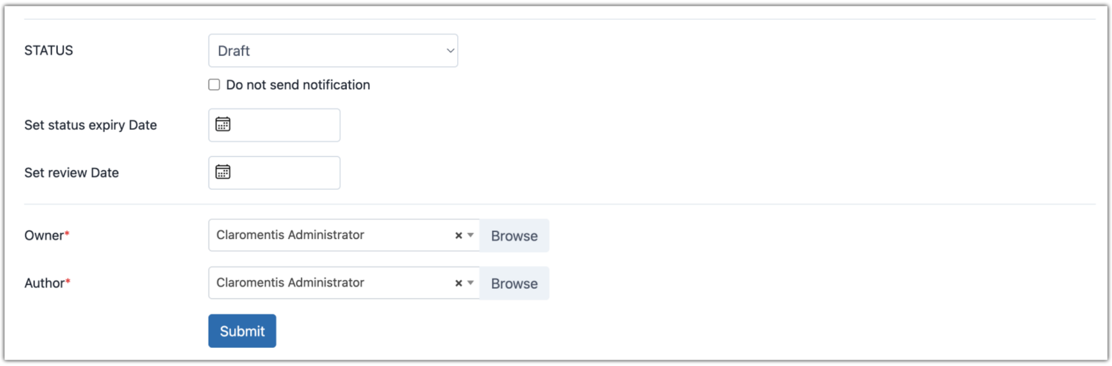


- **Ref:** Enter a reference code or number that will appear against the policy
- **Type:** (If these have been set up by administrators) select the appropriate type
- **Title:** The title of the policy
- **Description:** Enter a short summary of what the policy is about
- **Acceptance text:** Enter something here to appear as the acceptance message (for those in the 'target distribution' of the policy)
- **Cover Image:** The main image that appears in the policy and as its thumbnail
- **Category:** (Set up by administrators) select the appropriate category for the policy to appear within
- **Tags:** Enter any tags to assist searching for this policy
- **Asset Type:** Your team have likely decided how policy content will be added to your system before using the application. Upload or create the policy body using the relevant asset type. Read our guide here to learn more.

Step 3: Set the appropriate status

The two hardcoded statuses are 'draft' and 'distribution', where the former means the policy is not live and the latter means it has been published.

It's possible for extra statuses to be created in a system by Policy administrators to facilitate anapproval process; this is optional, so more statuses may appear on your site for selection here or not.



Generally, a policy can be put into 'distribution' status if all other steps and information have been filled out and you are ready to make this live.

Otherwise, put this into 'draft' to come back to later.

Step 4: Further Options

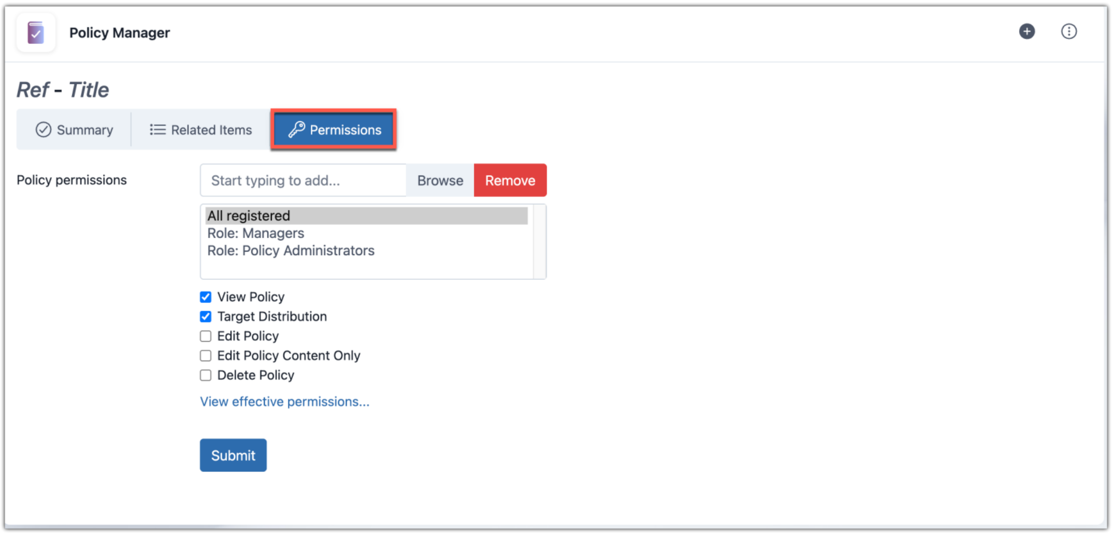
- **Do not send notification:** Check this box if no notification about the policy (when it is put into 'distribution' status) should be sent
- **Set Status expiry date:** Only relevant if an approval process is in use
- **Set review date:** Choose when Policy administrators (with 'Edit policy' rights) should be notified so they can check if the policy needs updating. Notification sent 15 days before and on the chosen date.
- **Owner:** Select the user who will appear as the owner of the policy
- **Author:** Select the user who will appear as the author of the policy

Step 5: Check and set permissions

Click into the 'permissions' tab at the top of the screen.

The default policy permissions set by administrators on the admin side of the application will have autopopulated here.

Click into each user/role/group entered to check what permissions they will have for your policy and tweak this as necessary - ensuring a role/group for Policy administrators have all rights to edit.



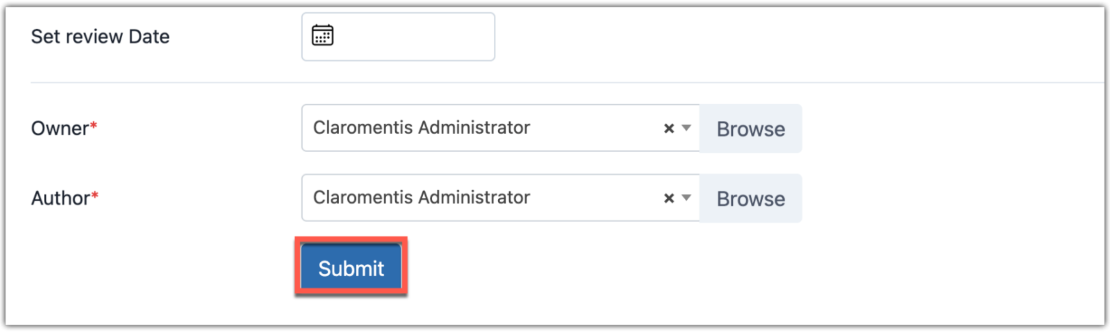
Please see our guide on policy permissions for more information.

If you want users to be prompted to read and accept the policy, ensure they have 'view' and 'target distribution' rights.

Step 6: Save the policy

Click back into the 'Summary' tab.

Scroll down and click 'submit' to create the policy in the status you chose.



Please note: 'Draft' Policies are not visible from the main page. Navigate to the 'Manage Policies' area to see policies in status: Draft

If the policy is put into 'distribution' status, users will be able to see this listed in the application and interact with it based on the permissions they were given.

Created on 31 March 2026 by Hannah Door. Last modified on 2 April 2026
Tags: category, create, new, policy