



# Migrating Your Policies to Policy Manager

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## Overview

Importing a large number of company policies to the Claromentis Policy Manager require some careful integration, depending on how your policies are currently stored. From our experience majority of customers have company policies stored as a file meaning they are typically in Word (.docx) or PDF (format). Claromentis support various type of Policy assets such as File Upload, Page (HTML), Weblink or file stored in Documents.

## Why store policies in Policy Managers and not in Documents?

Storing company policies in Policy Manager has added benefit such as workflow, and many features specific to help you issuing new policies, recall and making sure users are compliant. The document application is simply a file repository with version control.

## Migration Process

The migration process involved two step process, 1.Preparing the actual file, 2.Preparing CSV file containing metadata and description of the files.

### Step 1: Collect all of your policies

#### Option 1 - As Policy attachment

If you wish to collect all policies as an attachment to policy manager then collect all policies and prepare the files to be sent to Claromentis.

#### Option 2 - As Link to file stored in Documents

You may wish to upload the most recent version of the policies as part of Document Migration, once document migration is complete simply populate the CSV file with document ID as a reference.

## Step 2: Prepare Policy Manager CSV File

Download Policy Manager Template

**Column headings:**

**ref\_code:** Policy reference code

**title:** Policy title

**type:** type of policy for example : Policy, Procedures or Instruction

**category:** Policy category

**description:** Policy description

**owner:** user Id of the policy owner, id=1 is Administrator you can find out user's ID once they have been imported on the system

**creator:** user id of the policy creator

**author:** user id of policy author

**changed\_by:** user id of people who last modified the policy

**created\_date:** policy creation date in the format of YYYYMMDDHHMMSS (year, month, date, hour, minutes, seconds)

**review\_date:** policy review date in the format of YYYYMMDD

**filename:** file name of policy content is a file, for example: Sustainability Policy.pdf

**page:** html content if the policy content is html page (leave blank otherwise)

**link:** URL of the policy if the policy content is a link

**doc\_id:** document id if the policy content is a document on Claromentis Document

## Step 3: Raise a change request and transfer both files (Policy files and CSV)

Once both files are ready, submit a change request so that we can estimate the work and help you with mass import.

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### Related Article

[Migrating files to Claromentis Documents](#)

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Tags: policy, migrate