



## Policy Manager: Creating New Versions

Policy content on your site may just be for users to browse, or you may have asked them to [read & accept](#) these, or a mix of the two has been implemented.

Regardless of how the application is being used, over time, policy content can become outdated and needs updating.

When this situation arises, it's recommended to create a new version of the policy and apply the new changes.

This ensures any previous acceptance (if it was sent to users to read & accept) is retained, as well as keeping the previous version accessible in an archived state as a record.

## How to create a new version of a Policy

There are two stages in creating a new policy version and making it available to users.

Only users with [Edit Policy](#) permission can create a new version for it.

### 1. Edit policy & save in Draft status

- Open the policy you wish to create a new version of and click **Create New Version**.

The screenshot shows the 'Policy Manager > Policy Details' interface. The main content area displays the policy title 'PROCEDURES PDR-0003 - Audit Procedures' with a search icon and three numbered steps (1, 2, 3). Below the title, there are tags for 'Distribution', 'Policy version 1', and 'Accepted', along with a location tag 'internal, audit'. The main text describes audit procedures and provides tips. On the right side, there are three buttons: '+ Create New Version' (highlighted with a red box), 'Edit Properties', and 'Acceptance Status'.

- Make the changes that you need to the policy properties, content or permissions.

**Policy Manager**

You have started the process of creating a new version of this policy. If you wish to just edit the existing policy please click [here](#).

### PDR-0003 - Audit Procedures

Summary | Related Items | Permissions

Ref.\*: PDR-0003

Type: Procedures

Title\*: Audit Procedures

Description: Audit procedures are an important area of the syllabus, though candidates often use inappropriate audit procedures to answer questions. The following tips will help you to

Acceptance text: Policy Read & Understood

Cover image: Change image | Delete image

- Once ready, make sure you're in the **Summary** tab and click **Submit** to save the content as a draft.

**Step 1 – Identify**  
Audit procedures are performed in order to test financial statement assertions. Therefore, the first step in explaining an audit procedure is to identify the assertion that needs to be tested.

**Step 2: Identify the audit procedure**  
Choose from Completeness, Valuation, and Allocation

**Step 3: Note the following while writing down the audit procedure**

STATUS: **Draft**

Do not send notification

Set status expiry Date:

Set review Date:

Owner\*: Michael Christian x Browse

Author\*: Michael Christian x Browse

**Submit**

## 2. Edit policy, check permissions & set to Distribution

The new policy version will be created, with the previous now listed as **Archived**.

- Click **Edit Properties** to edit the policy once more.

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Ask anything 13:00

Home Company Projects Product Training Sales Training

Policy created

Policy Manager > Policy Details

**PROCEDURES**  
PDR-0003 - Audit Procedures

**Draft** Policy version 2 audit, internal

Audit procedures are an important area of the syllabus, though candidates often use inappropriate audit procedures to answer questions. The following tips will help you to understand the concepts and write appropriate audit procedures.

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Every procedure must state:

- The assertion tested
- The audit procedure
- The reason for the procedure

Each of these points is explained below.

Edit Properties

Edit Policy Content

Archived versions

PDR-0003 - Audit Procedures  
Policy version 1  
Created: 24 February 2019

- Make final checks that all content has been updated as needed for the new version and that any permissions changes have also been applied.

**Please note:** If users must read & accept the new version of the policy, ensure they're assigned the [Target Distribution](#) permission.

Audit procedures are performed in order to test financial statement assertions. Therefore, the first step in explaining an audit procedure is to identify the assertion that needs to be tested.

**Step 2: Identify the audit procedure**  
Choose from Completeness, Valuation, and Allocation

**Step 3: Note the following while writing down the audit procedure**

STATUS

Draft

Distribution

Do not send notification

Set status expiry Date

Set review Date

Owner\* Michael Christian x Browse

Author\* Michael Christian x Browse

Submit

- When ready, in the **Summary** tab, change the status to **Distribution** and click **Submit**.
- The system will ask if you wish to send a notification to users who are in the **Target Distribution**.

Policy Manager

Please note: The old version of this policy **PDR-0003-Audit Procedures** will be automatically recalled and replaced with this one. The old policy will be available in the version history.

Send notification to users to read and re-accept the new version of this policy.

Do not send notification

Submit

If the policy is read-only (i.e., acknowledgement not required), select **Do not send notification**.

Otherwise, send the notification, and users will receive this based on their [notification preferences](#), prompting them to [read & accept](#)

the new version.

## Management over time

Policy editors can identify which policies need a new version over time by using the following controls.

- **Manage Policies area**

From the front-end of Policy Manager, users can view, edit, create new versions, delete, and manage all policies for which they have permission.

The screenshot shows the 'Policy Manager' interface. At the top, there is a search bar with 'Keywords' and a 'Status' dropdown set to '- Active -'. Below the search bar are 'Search' and 'Reset' buttons, and an 'Export to CSV' button. A dropdown menu is open, showing options: 'A to Z', 'Manage Policies' (highlighted with a red box), 'Policy Users Report', and 'Policy Manager - Admin'. Below the search bar is a table with the following columns: Reference, Title, Asset, Type, Owner, Status, Review Date, and Action. The table contains four rows of policy data. The 'Action' column for each row contains three icons: a pencil, a trash can, and a plus sign. The 'Action' column is highlighted with a red box.

Reference	Title	Asset	Type	Owner	Status	Review Date	Action
PDR-0003	<a href="#">Audit Procedures</a>	Page	Procedures	Michael Christian	Distribution	15 April 2027	
OPS-001	<a href="#">Bean &amp; Brew Coffee Co. Franchise Operations Manual</a>	Page	Procedures	Jennifer Langdon	Distribution	8 September 2026	
INS-0002	<a href="#">Foreign travel advice</a>	Weblink	Instruction	Michael Christian	Distribution		
POL-0003	<a href="#">Sustainability Policy</a>	Page	Policies	Michael Christian	Distribution	23 May 2027	

- **Set a review date on all policies**

The **Review date** field, set for each policy when it is created or edited, helps with overall policy maintenance and updates.

A notification will fire 15 days before the entered date and will be received by users with the **Edit Policy** permission so they can action this (e.g. check the policy content, create a new version and/or set a new review date).

The screenshot shows the 'Edit Policy' form. At the top, there is a text area containing a list of bullet points: 'To comply with, and exceed where practicable, all applicable legislation, regulations and codes of practice', 'To integrate sustainability considerations into all our business decisions', 'To ensure that all staff are fully aware of our Sustainability Policy and are committed to implementing and improving it', 'To minimise the impact on the sustainability of all office and transportation activities', 'To make clients and suppliers aware of our Sustainability Policy, and encourage them to adopt sound sustainable management practices', and 'Continually strive to improve our sustainability performance'. Below the text area is a 'STATUS' dropdown menu set to 'Distribution'. There is a checkbox for 'Do not send notification' which is unchecked. Below that is a 'Set status expiry Date' field with a calendar icon. The 'Set review Date' field is highlighted with a red box and contains the date '23-05-2027'. Below the date field is a red checkbox for 'Recall this policy' which is checked. At the bottom, there are 'Owner' and 'Author' fields, both set to 'Michael Christian' with a 'Browse' button next to each. A 'Submit' button is at the bottom.



**POLICIES**  
**POL-0003 - Sustainability Policy**

Distribution Policy version 1 internal , sustainability

Claromentis is committed to promoting sustainability. Concern for the environment and promoting a broader sustainability agenda are integral to Claromentis' professional activities and the management of the organisation.

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We aim to follow and to promote good sustainability practice, to reduce the environmental impacts of all our activities and to help our clients and partners to do the same.

 **Review Date** 23 May 2027

+ Create New Version

 Edit Properties

Acceptance Status

Created on 1 April 2026 by [Hannah Door](#). Last modified on 21 April 2026

Tags: [policy](#), [policy manager](#), [user guide](#), [renew](#)