

Policy Asset Types

Introduction

In Claromentis, there are several methods to get a policy onto the Intranet also known as Asset Types.

These can be especially useful when you want to use specific asset types for certain policies as they offer different attributes. The available options are as follows:

- [File upload](#)
- [Page](#)
- [File From Documents](#)
- [Weblink](#)

To learn more about how to create a new policy, make sure to visit our article [here](#).

File upload

Selecting 'File upload' means choosing a file (i.e. an existing policy) from your personal computer to upload to policy manager. This option allows you to attach files, such as PDFs, Word docs, and other common file types.

You can easily upload files from your PC by (a) clicking the Choose File option...

A screenshot of a web form titled 'Asset Type *'. It contains four radio button options: 'File upload' (which is selected), 'Page', 'File from Documents', and 'Weblink'. Below these options is a button labeled 'Choose File'. A red arrow points from the right towards the 'Choose File' button.

... or (b) by simply using the drag-and-drop feature to upload the existing file:

A screenshot of the Claromentis web application interface. The top navigation bar is purple with the 'claromentis' logo and a search bar. Below it is a menu with links like HOME, COMPANY, DEPARTMENT, FORMS, LEARNING, SUMMER EVENT, PROJECTS, BOOK A PERSONALISED DEMO, and LEARN MORE. The main content area shows a form for creating a new policy. The 'Asset Type *' section has 'File upload' selected. Below this is a 'Choose File' button and the text 'No file chosen'. Further down, there are fields for 'STATUS' (set to 'Draft'), 'Set status expiry Date', 'Set review Date', 'Owner' (set to 'Claromentis Administrator'), and 'Author' (set to 'Claromentis Administrator'). A 'Submit' button is at the bottom.

Once uploaded, this will present front-end users with a link they can use to download a copy of the file to read and accept.

Policy Manager / Policy Details

PTest-0001 - Claromentis Policy Test

Distribution

Policy version 1

+ Create New Version

Edit Properties

Acceptance Status

Microsoft Word - ERM... 1 / 9 90% + | | | |

1

claromentis

support and services

Written by: Claromentis Support and Services Team

Policy Example Version 2.0.pdf

Policy Details

Comments

Asset History

Policy History

Approval History

Acceptance History

Distribution

Please read this policy and indicate that you have read it and understood

☐ Policy Read & Understood

Submit

Category

General

Status Changed by

Claromentis Administrator

Last Modified by

Claromentis Administrator

Author

Claromentis Administrator

Creator

Claromentis Administrator

Owner

Claromentis Administrator

Please note: The download option here cannot be disabled. If you want to prevent users from downloading the policy, please refer to the page asset type found below.

Page type

Using the 'Page' option means the policy can be written directly into Policy Manager using the CK Editor (also used to create News and Knowledge Base articles):

File from document

The 'File from Documents' upload method allows you to select a policy from the Documents application of your Intranet.

If you have a document already saved on the intranet that you also need to display in the Policy Manager application, you can use the picker to select it from the appropriate folder as a quick and easy option:

The screenshot shows the 'File from Documents' form in the Claromentis Policy Manager. The form is titled 'claromentis' and has a search bar. Below the search bar are navigation links: HOME, COMPANY, DEPARTMENT, FORMS, LEARNING, SUMMER EVENT, PROJECTS, BOOK A PERSONALISED DEMO, and LEARN MORE. The form includes a 'Tags' section with a search bar and a list of popular tags: intranet, claromentis, microsoft, excel, social. The 'Asset Type' section has four radio buttons: File upload, Page, File from Documents (selected), and Weblink. Below this is a 'Select Document' button. The 'STATUS' section has a dropdown menu set to 'Draft' and a checkbox for 'Do not send notification'. The 'Set review Date' and 'Set status expiry Date' fields are also present. The 'Owner' and 'Author' fields are both set to 'Anne Wilkins' with a 'Browse' button next to each. A 'Submit' button is at the bottom.

Users will have the same option as when using the file upload option to download the file to read and then accept:

The screenshot shows the 'Policy Details' page in the Claromentis Policy Manager. The page title is 'Sample Version 2.0.pdf'. Below the title is a 'Policy Details' section with a green background. It contains the text 'Distribution' and 'Please read this policy and indicate that you have read it and understood'. There is a checkbox labeled 'Policy Read & Understood' which is checked. A 'Submit' button is at the bottom of the green section. Below the green section, there is a table with metadata:

Last Modified by	Claromentis Administrator	Author	Claromentis Administrator
Creator	Claromentis Administrator	Owner	Claromentis Administrator

Please note: Even if the policy is deleted, the document you chose to upload as the policy will still exist in the Documents application.


Weblink type

Using the 'weblink' upload option means the policy isn't stored within Claromentis at all, but rather is a link to an external site that hosts the policy (i.e. government policy):

The screenshot shows the 'Weblink' form in the Claromentis Policy Manager. The 'Asset Type' section has four radio buttons: File upload, Page, File from Documents, and Weblink (selected). Below the radio buttons is a text input field for the weblink URL.

From the front end, the policy will display as such for users to follow:

Policy Manager / Policy Details




INSTRUCTION

INS-0002 - Foreign travel advice

Distribution

Policy version 1

 claromentis, travel

Travel Advice from UK Government

<https://www.gov.uk/foreign-travel-advice>

Policy Details

Distribution

Please read this policy and indicate that you have read it and understood

☐ Policy Read & Understood

Submit

Last Modified by

Claromentis Administrator

Author

Michael Christian

Creator

Michael Christian

Owner

Michael Christian

Reminder: If the policy needs to be acknowledged (i.e. read & accept), users will have to check the acceptance box from within Claromentis for it to be logged in the acceptance history. Accepting a policy outside of Claromentis will not be recorded within the intranet.

All policies regardless of asset type will be searchable using the global search.

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

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