

## 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:

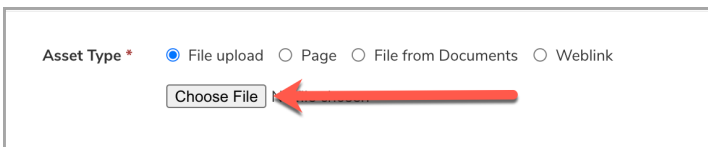
- [File upload](#)
- [Page](#)
- [File From Documents](#)
- [Weblink](#)

To learn more about how to create a new policy, make sure to visit our article here.

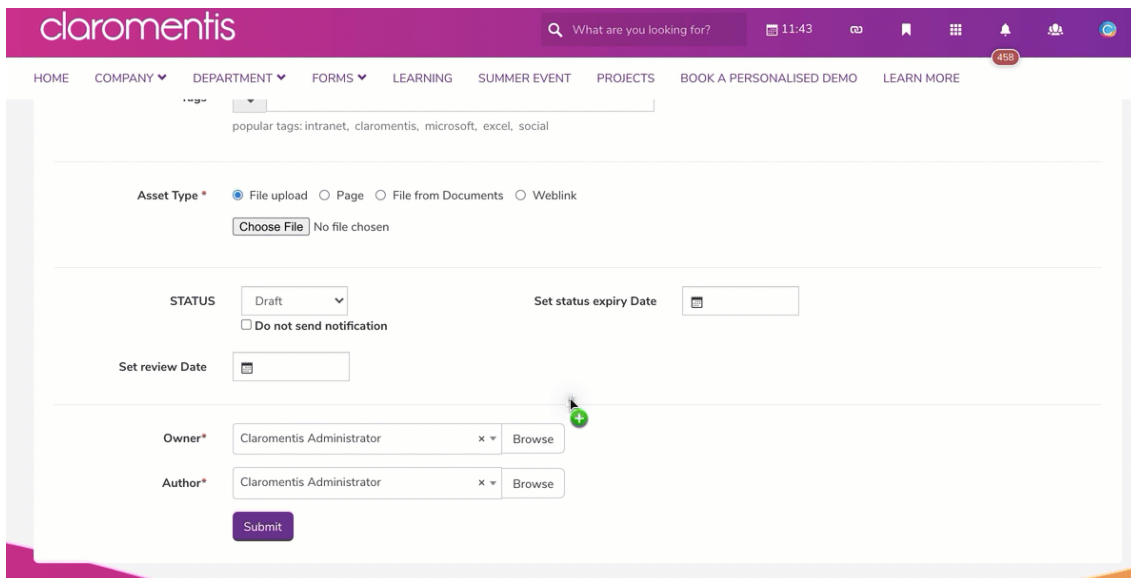
### File upload

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...



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



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.

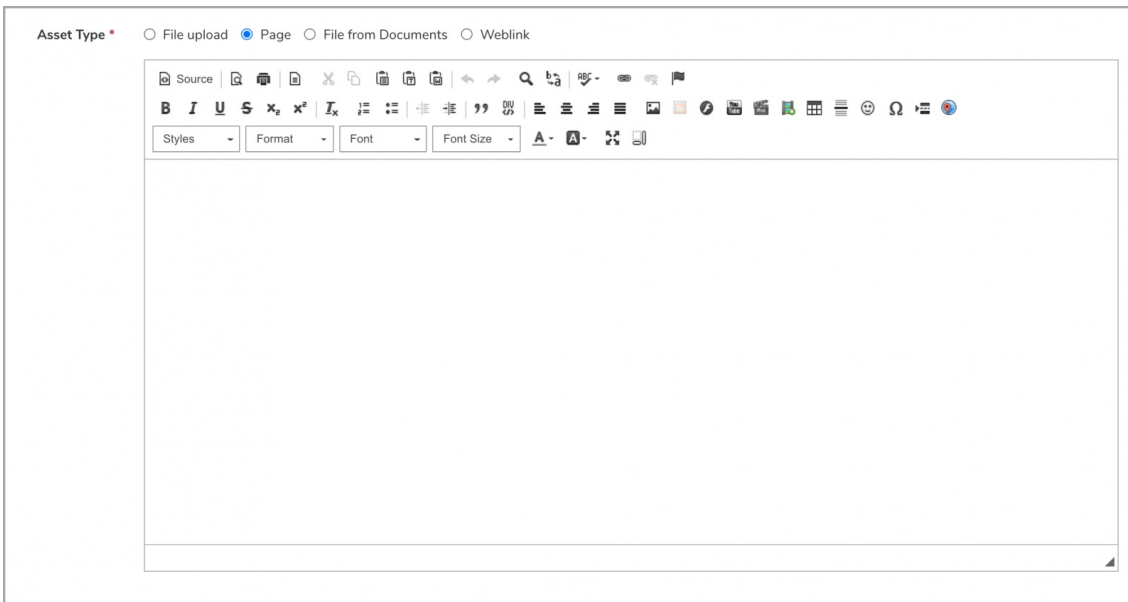
The screenshot displays the 'Policy Manager / Policy Details' interface for a policy titled 'PTest-0001 - Claromentis Policy Test'. The interface includes a top navigation bar with a '+' icon and a list icon. On the right side, there are three green buttons: '+ Create New Version', 'Edit Properties', and 'Acceptance Status'. The main content area shows a preview of a Microsoft Word document. The document header reads 'Microsoft Word - ERM...' and '1 / 9' pages, with a zoom level of 90%. The document content features the Claromentis logo (support and services) and the text 'Written by: Claromentis Support and Services Team'. Below the preview, a download link 'Policy Example Version 2.0.pdf' is highlighted with a red box. At the bottom, there is a 'Distribution' section with a green background, containing the text 'Please read this policy and indicate that you have read it and understood' and a checkbox for 'Policy Read & Understood' with a 'Submit' button. Below the distribution section, there is a table of metadata:

<b>Category</b>	General	<b>Status Changed by</b>	Claromentis Administrator
<b>Last Modified by</b>	Claromentis Administrator	<b>Author</b>	Claromentis Administrator
<b>Creator</b>	Claromentis Administrator	<b>Owner</b>	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

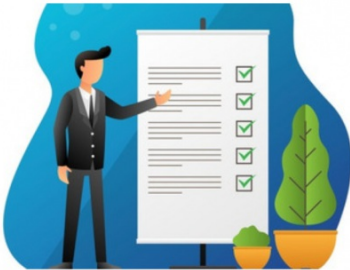
Using the 'Page' option means the policy can be written directly into Policy Manager using the CK Editor (also used to create News and Knowledge Base articles):



From the front end, this means users will be able to read the policy directly on the page and do not require downloading anything.

Policy Manager / Policy Details

+
↕
☰
📄
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### PROCEDURES

## PDR-0003 - Audit Procedures

Distribution
Policy version 1
👤 internal.audit

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.

📅 Status Expiry Date 24 February 2022 255 day(s) left

📅 Review Date 24 January 2022

+ Create New Version

✎ Edit Properties

Acceptance Status

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.

Every procedure must state:

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

Each of these points is explained below.

**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**  
Audit procedures should be written in such a way that even a junior auditor will be able to understand what is to be done.

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

<b>Category</b>	General	<b>Status Changed by</b>	Michael Christian
<b>Review Date</b>	24 January 2022	<b>Status Expiry Date</b>	24 February 2022
<b>Last Modified by</b>	Claromentis Administrator	<b>Author</b>	Michael Christian

**Reminder:** You can use the page asset type if you do not want users to download the policy (i.e. PDF). If you have an existing policy in PDF format, the content will have to copy & paste into the CK editor as this is how the files appear in Policy manager.

## 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 Claromentis user interface for creating a policy. At the top, there is a navigation bar with the Claromentis logo, a search bar, and various utility icons. Below the navigation bar, there are several tabs: HOME, COMPANY, DEPARTMENT, FORMS, LEARNING, SUMMER EVENT, PROJECTS, BOOK A PERSONALISED DEMO, and LEARN MORE. The main content area is a form for creating a policy. It 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 (which is selected), and Weblink. Below this is a 'Select Document' button. The 'STATUS' section has a dropdown menu set to 'Draft', a 'Set status expiry Date' field, and a checkbox for 'Do not send notification'. The 'Set review Date' field is also present. The 'Owner\*' and 'Author\*' fields both have 'Anne Wilkins' selected and a 'Browse' button. A 'Submit' button is at the bottom of the form.

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 details of a policy titled 'Sample Version 2.0.pdf'. The title is highlighted with a red box. Below the title, there is a 'Policy Details' section. The 'Distribution' section is highlighted in green and contains the text: 'Please read this policy and indicate that you have read it and understood'. Below this text is a checkbox labeled 'Policy Read & Understood' and a 'Submit' button. At the bottom of the page, 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 'Asset Type' section of the form. It has four radio buttons: File upload, Page, File from Documents, and Weblink (which is selected). Below the radio buttons is an empty text input field.

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  
**Creator** Michael Christian

**Author** 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

Created on 14 June 2021 by Veronica Kim

Tags: policy, policy manager, user guide, asset