

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:

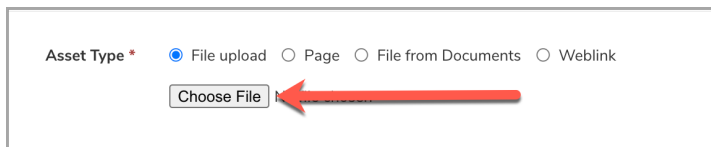
- [File upload](#)
- [Page](#)
- [File From Documents](#)
- [Weblink](#)

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

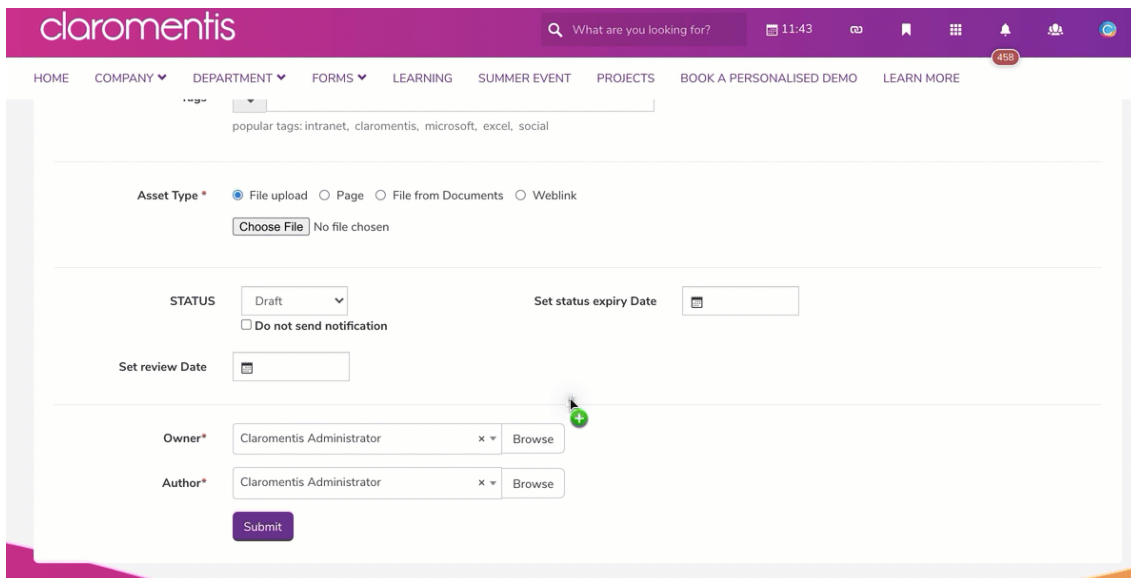
File upload

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.

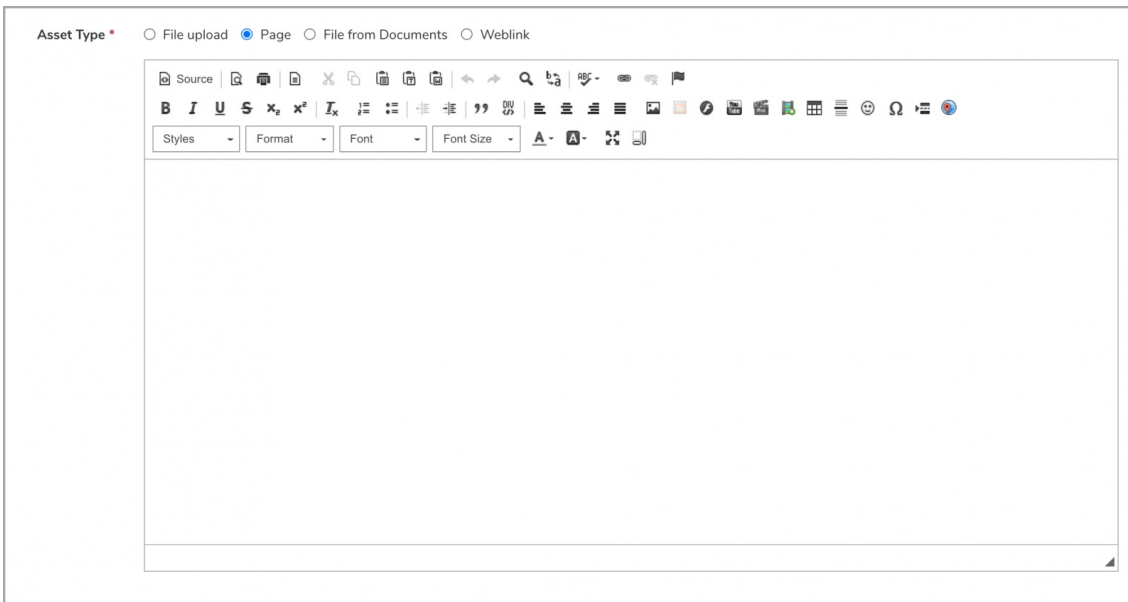
The screenshot displays the 'Policy Manager / Policy Details' interface for a policy titled 'PTest-0001 - Claromentis Policy Test'. The interface includes a top navigation bar with a '+' icon and a list icon. Below the title, there are three main action buttons: '+ Create New Version', 'Edit Properties', and 'Acceptance Status'. The central area features a preview of a Microsoft Word document titled 'Microsoft Word - ERM...' with a page number of 1 and a zoom level of 90%. The document content includes the Claromentis logo and the text 'Written by: Claromentis Support and Services Team'. Below the preview, a download link for '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 a checkbox for 'Policy Read & Understood' and a 'Submit' button. The bottom of the interface shows a metadata table with the following details:

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

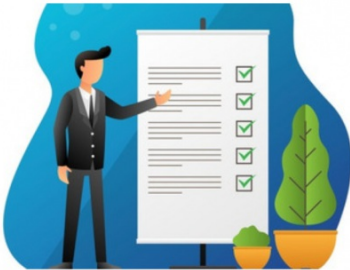
Using the 'Page' option means the policy can be written directly into Policy Manager using the CK Editor (also used to create News and Knowledge Base articles):



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

Submit

Category	General	Status Changed by	Michael Christian
Review Date	24 January 2022	Status Expiry Date	24 February 2022
Last Modified by	Claromentis Administrator	Author	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 'File from document' upload form in the Claromentis interface. The form includes a search bar at the top with the text 'What are you looking for?'. Below the search bar is a navigation menu with links for HOME, COMPANY, DEPARTMENT, FORMS, LEARNING, SUMMER EVENT, PROJECTS, BOOK A PERSONALISED DEMO, and LEARN MORE. The main form area has a 'Tags' section with a search input and a list of popular tags: intranet, claromentis, microsoft, excel, social. The 'Asset Type' section has radio buttons for '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.

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 'Sample Version 2.0.pdf' policy details page. The title 'Sample Version 2.0.pdf' is highlighted with a red box. Below the title is the 'Policy Details' section, which includes a 'Distribution' section with a green background. The 'Distribution' section contains the text 'Please read this policy and indicate that you have read it and understood' and a checkbox for 'Policy Read & Understood'. A 'Submit' button is located below the checkbox. 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 upload form. The radio buttons are '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 **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](#)

Created on 14 June 2021 by [Veronica Kim](#)

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