Importing Policy Documents From Word

Last Modified on 05/14/2018 4:55 pm EDT

Importing Policy Documents From Word

Potentially large policy documents can be imported directly into RiskVision from word processing applications such as Microsoft Word, saving considerable time. In addition, a policy document can be maintained in parallel outside RiskVision, and re-imported to update the system.

When importing from a word processing document (.doc, .docx, .odt, and .rtf formats are supported), RiskVision will attempt to create a hierarchy of sections and sub-sections. Best results will be seen when the source document is well-formed, as described in more detail in Creating Policies Based on Microsoft Word Documents.

To import a policy document for the first time:

1. Go to **Content** > **Policies**, select a folder in which you have privileges to create a policy.

2. Select Import Policy from Word in the More Actions... drop-down list.
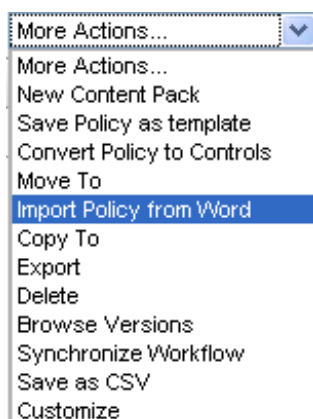
3. Select your source document and click OK. The import process will not modify the source document.

Once the policy has been imported, you can edit, delete or acted upon like any other policy document.

To re-import from Word to update a policy:

1. Follow the above directions for importing a policy document for the first time. Select the folder containing the policy document to update.

2. The system detects the document by its name and updates the contents of sections and subsections.

3. Major changes, such as document reorganization or deleted sections will not update smoothly. In this case, rename the source document and import as new.