

Create A New Policy

RiskVision provides organization content, including templates, that help create policies that you can tailor to your organization's individual needs. You can also create policies from scratch and import existing policy documents. In order to perform these operations, you should have the Policy View and Policy Author permissions. Users with Policy Manage permission can also create new policies.

To create a new policy, select the destination policy group in the **Organization Content** tree, then click **New**. Policies can also be created under content packs or control groups.

The **Create a Policy Document** wizard includes the following steps:

- General;
- Workflow;
- Ownership; and
- Review Recurrence.

The screenshot shows a software window titled "Create Policy Document" with a close button in the top right corner. On the left is a vertical sidebar with four steps: "1. General" (highlighted), "2. Workflow", "3. Ownership", and "4. Review Recurrence". The main area is titled "Step 1: Create a Policy" and includes a note: "Create a policy by entering the general information first." Below this are four required fields: "Name*" with the value "Use of Emergency Equipment", "Template*" with a dropdown menu showing "Agilience Default", "Identifier" with the value "Use of Emergency Equipment", and "Description" with a text area containing the placeholder "Click to enter text". At the bottom, there are "Cancel", "< Back", and "Next >" buttons.

General

Enter a name, identifier and description for the new policy and choose a Policy Template that will define the initial structure of sections and subsections for the new policy.

Workflow

Workflow is optional for policies. You can create a policy without workflow, or associate a workflow with a policy later.

To apply a workflow to a policy, select an existing Workflow Template, or click Create a new template. The wizard displays the workflow stages (such as Draft, Review, Approval, Deploy) from the template for your review.

Creating a New Policy Workflow Template

When you create a new policy workflow template, you can identify a number of stages and a set of stakeholders for each stage. Stakeholders can include specific users, policy roles (such as Policy Approver or Policy Author), or teams.

New Policy Workflow [Save] [Cancel]

Workflow Template Name:

+ Add New Stage + Add Terminal Stage

1 Draft

Assign Stakeholders

Owner Team Search

Policy Approver
Policy Author
Policy Reviewer
[Add as Stakeholder>>](#)

Stakeholders
Policy Author
[Notify](#) [Remove](#)

Actions

Label	Next Stage	Email Template	Status	
<input checked="" type="checkbox"/> Submit for Review	Review	Do not send Email	In Review	Preview
<input type="checkbox"/>				Preview
<input type="checkbox"/>				Preview
<input type="checkbox"/>				Preview

Workflow Start Notification
 Notify selected stakeholder use Email Template:

Allow Delegation
Delegation Label: use Email Template: [Preview](#)
 Allow additional stakeholders to be added

For more information, see [About Policy Workflow](#) .

Ownership

The user creating the policy is the primary owner by default, but you can choose another user to be the primary owner. To add additional owners, click **Add Owners**. The wizard displays the list of all owners for your review. Primary owners are the stakeholders who will receive notifications when the policy enters a particular stage.

Review Recurrence

Policies are often re-evaluated on a regular basis. Specify how often the policy is to be reviewed (for example, Never, Monthly, Quarterly, and so on).

Click **Notification E-mail Template** from the dropdown menu to be used to remind policy owners of the need to re-evaluate the policy.