Migrating Your Policies to Policy Manager

Overview

Importing a large number of company policies to the Claromentis Policy Manager require some careful integration, depending on how your policies are currently stored. From our experience majority of customers have company policies stored as a file meaning they are typically in Word (.docx) or PDF (format). Claromentis support various type of Policy assets such as File Upload, Page (HTML), Weblink or file stored in Documents.

Why store policies in Policy Managers and not in Documents?

Storing company policies in Policy Manager has added benefit such as workflow, and many features specific to help you issuing new policies, recall and making sure users are compliant. The document application is simply a file repository with version control.

Migration Process

The migration process involved two step process, 1.Preparing the actual file, 2.Preparing CSV file containing metadata and description of the files.

Step 1: Collect all of your policies

Option 1 - As Policy attachment

If you wish to collect all policies as an attachment to policy manager then collect all policies and prepare the files to be sent to Claromentis.

Option 2 - As Link to file stored in Documents

You may wish to upload the most recent version of the policies as part of Document Migration, once document migration is complete simply populate the CSV file with document ID as a reference.

Step 2: Prepare Policy Manager CSV File

Download Policy Manager Template

Column headings:

ref_code: Policy reference code

title: Policy title

type: type of policy for example : Policy, Procedures or Instruction

category: Policy category

description: Policy description

owner: user Id of the policy owner, id=1 is Administrator you can find out user's ID once they have been imported on the system

creator: user id of the policy creator

author: user id of policy author

changed_by: user id of people who last modified the policy

created_date: policy creation date in the format of YYYYMMDDHHMMSS (year, month, date, hour, minutes, seconds)

review_date: policy review date in the format of YYYYMMDD

filename: file name of policy content is a file, for example: Sustainability Policy.pdf

page: html content if the policy content is html page (leave blank otherwise)

link: URL of the policy if the policy content is a link

doc_id: document id if the policy content is a document on Claromentis Document

Step 3: Raise a change request and transfer both files (Policy files and CSV)

Once both files are ready, submit a change request so that we can estimate the work and help you with mass import.

Related Article

Migrating files to Claromentis Documents

Tags: policy, migrate