KNOWLEDGE BASE ARTICLE

How to Import Policy Drafts from a Document Library

2026 © Vitextra SIA. All rights reserved.

Disclaimer

For the purposes of this Disclaimer:

- **Company** (referred to as either "the Company", "We", "Us" or "Our" in this Disclaimer) refers to Vitextra SIA, LV-1009 Riga, Matise iela 61 - 25.
- **Document** refers to the Knowledgebase Article.
- **You** means the individual accessing the Document, or the company, or other legal entity on behalf of which such individual is accessing or using the Document, as applicable.
- **Website** refers to Vitextra, accessible from https://vitextra.com

Disclaimer

The information contained in the Document is for general information purposes only.

The Company assumes no responsibility for errors or omissions in the contents of the Document.

In no event shall the Company be liable for any special, direct, indirect, consequential, or incidental damages or any damages whatsoever, whether in an action of contract, negligence, or other torts, arising out of or in connection with the use of the contents of the Document. The Company reserves the right to make additions, deletions, or modifications to the contents in the Document at any time without prior notice.

Errors and Omissions Disclaimer

The information given by the Document is for general guidance on matters of interest only. Therefore, errors can occur even if the Company takes every precaution to ensure that the Document's content is current and accurate. Plus, given the changing nature of laws, rules, and regulations, there may be delays, omissions, or inaccuracies in the information contained in the Document.

The Company is not responsible for any errors or omissions, or for the results obtained from the use of this information.

Fair Use Disclaimer

The Company may use copyrighted material that the copyright owner has not explicitly authorized. The Company is making such material available for criticism, comment, news reporting, teaching, scholarship, or research.

The Company believes this constitutes a "fair use" of any such copyrighted material as provided for in section 107 of the United States Copyright law.

If You wish to use copyrighted material from the Document for your own purposes that go beyond fair use, You must obtain permission from the copyright owner.

"Use at Your Own Risk" Disclaimer

All information in the Document is provided "as is", with no guarantee of completeness, accuracy, timeliness or of the results obtained from the use of this information, and without warranty of any kind, express or implied, including, but not limited to warranties of performance, merchantability and fitness for a particular purpose.

The Company will not be liable to You or anyone else for any decision made or action taken in reliance on the information given by the Service or for any consequential, special or similar damages, even if advised of the possibility of such damages.

Contact Us

If you have any questions about this Disclaimer, You can contact Us by email: support@vitextra.com.

Table of contents

Prepare the library and access 4

Select and import files 4

Review the created drafts 5

Avoid duplicates and partial-import mistakes 5

Turn imported cards into a managed collection 6

Reconcile a batch before retrying 6

Publish and verify 7

Library import creates policy cards for selected files that already exist on the hub site. It is useful for preparing an existing document collection for policy management. It does not upload files, migrate content from another site, publish versions or assign employees.

Prepare the library and access

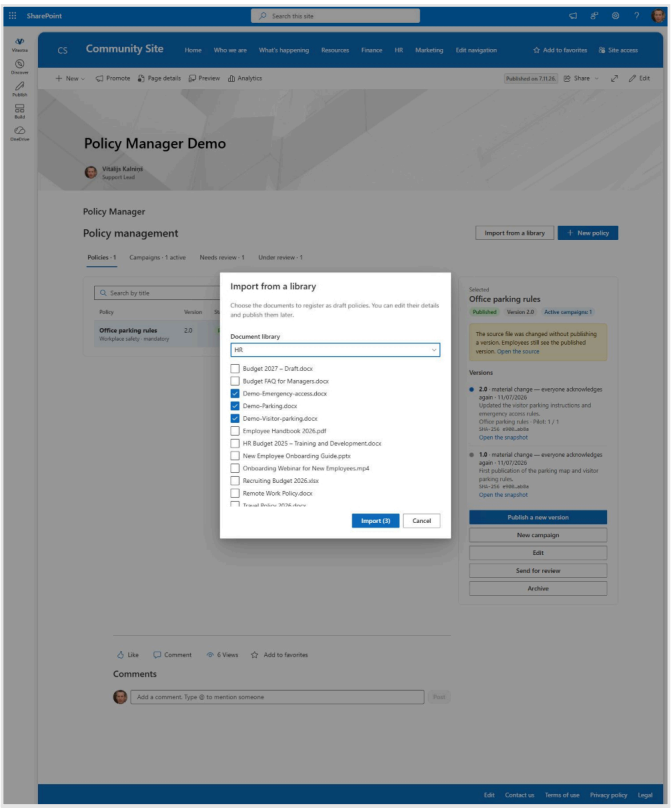
Use an administrator or compliance-manager account for the initial import and follow-up ownership checks. The import dialog reads visible document libraries on the resolved hub. It excludes the product's version library and certain system libraries by title, including Site Assets and Site Pages.

Make sure the source files are readable and that the intended employee population will have access. For files outside the hub's available libraries, create individual policy cards with the appropriate source URL instead of expecting the import selector to browse the whole tenant.

Select and import files

1 Open Policy Manager and choose **Import from a library**. The same operation is available at the final step of the setup wizard.
2 Select **Document library** and wait for the file list to load.
3 Select the checkboxes for the files you want to register. Start with a small batch so that you can inspect the result.
4 Select **Import** and wait for the operation to finish. The button shows the selected count.
5 Note the reported number of imported cards and close the dialog when complete.

The dialog retrieves up to 500 file items, ordered by file name, without paging through additional results. If a file is not offered, check the selected library and this limit. It is not evidence that the file does not exist or that another file type is unsupported.



Selecting source files for draft policy cards

Review the created drafts

The import uses the file name without its extension as the title, stores the file URL, selects the Document source type and creates a mandatory draft with default reading controls. Description, acknowledgement text, tags and review dates are not populated from the document's business meaning.

Current import entry points pass no owner into the operation. Do not assume that the importing user becomes the owner. Open each draft and select its owner, review the category and importance, complete the description and dates, and set suitable reading controls. Drafts without an owner may not appear in an author's owner-filtered view; an administrator or compliance manager can complete them.

Avoid duplicates and partial-import mistakes

Warning

The importer does not check whether a policy card already points to the selected file. Repeating the import can create duplicate cards. Files are processed one at a time, so an error can leave some drafts created even when the whole batch did not finish. Inspect the policy list before retrying; select only the files still missing.

If the result seems empty, select the draft or all-status filter and check as an administrator. Confirm the hub and clear title/category filters. Do not launch a campaign against an unintended duplicate just because its file name looks correct.

Turn imported cards into a managed collection

Importing a library is an inventory step. The file name supplies a starting title, but it may include internal codes or wording that employees will not recognize. Review the title and description so that an employee can distinguish the policy before opening the source. Do not assume the import has inferred importance, organizational scope or responsibility from the document text.

Assign owners before asking authors to maintain the drafts. Since the import does not supply an owner, an author's filtered view may not contain the new cards even though an administrator can see them. Agree which owner will handle questions and later review the content, rather than merely selecting someone to make the card appear in a list.

For each draft, check category, confirmation wording, reading controls and review date. If a category provides an appropriate statement, verify that fallback in the reader; otherwise provide suitable policy-specific wording. Source access is a separate check: registering a file does not change who can read its library.

Reconcile a batch before retrying

Suppose you select a small group of files and an error appears partway through import. First inspect the draft list and compare the cards' source URLs with the selected files. A matching title alone is not enough to distinguish a valid card from a duplicate, especially when libraries contain similarly named files.

Keep a simple review record with the source URL, created card identifier, assigned owner and publication readiness. This is a suggested administrative check, not an additional import feature. It helps you select only genuinely missing files for a retry and avoid publishing duplicate cards for the same source.

If a desired file is outside the selector's loaded window, use the library and item-count checks to establish why it is absent. Do not repeatedly run the same selection hoping that it automatically pages through the rest. For content outside the available hub libraries, create the individual card through the normal policy form.

Finish the batch in stages: reconcile created drafts, complete their metadata, verify sources, then publish and distribute the approved items. A successful import count measures cards created, not policies reviewed or employees assigned.

Publish and verify

Once the card metadata and source access are correct, publish its first version using KB10502. How to Publish the First Version of a Policy. Create a separate campaign using KB10503. How to Create and Launch a Policy Acknowledgement Campaign and verify one employee assignment. Keep a record of which imported cards were reviewed so that a large preparation batch is not confused with a completed rollout.