

MICROSOFT WORD CONNECTOR

Governance, risk and compliance management programs involve extensive communication, documentation, and reporting. ProcessUnity's cloud-based platform and applications provide a rich set of functions, including document capture and dynamic reporting, to support secure, web-based data management; individual and collaborative work; verification; and remediation. But many users prefer to produce their own tailored documents, correspondence, and reports as part of their risk or compliance program. That's why ProcessUnity offers a desktop integration tool to create personalized, professional-looking Microsoft® Word™ documents within the ProcessUnity platform.

Once installed and activated, the Word Connector can be accessed via a tab or button on a record within the ProcessUnity interface for fast, easy generation of user-defined reports and documents.

A seamless tool for creating elegant documents and reports

The Word Connector enables business users to create a word template or Word macro-enabled template using context-based content from records within ProcessUnity individually or in bulk. The template maps specific ProcessUnity properties to fields within the Word document and automatically populates those fields using intuitive content control, similar to a mail merge. You can use Word Template to create individual or multiple documents containing specified data from the ProcessUnity platform to meet your specific requirements.

The screenshot illustrates the workflow for creating a Word template. On the left, the 'SETTINGS' menu is shown with 'MS Word Templates' highlighted. An arrow points to the 'New MS Word Template' form, which includes fields for Name, Description, Owner (set to System Administrator), and a dropdown for Object Type. The 'Vendor' option is selected in the dropdown. A second arrow points to a preview of the 'Closing Memo' document, which shows the following content:

Closing Memo
MS Word Template

Description
Closing memo for TPRM program.

Owner
Mike Goldsmith

Object Type
Vendor

Generated File Name
[name]-[mm][dd][yyyy]

Report Reference Key
Name

Template File
 TPRM Closing Memo v1.dotx

The ProcessUnity Word Connector enables business users to quickly add Word templates for use within their ProcessUnity instance.

Take advantage of the Word Connector to create a wide variety of custom-formatted documents and reports, including:

- Program Status Reports
- Management / Executive Team Reports
- Welcome Letters
- Statements of Services
- Third-Party Contracts
- Assessment Summaries
- Remediation Plans
- Vendor Scorecard Reports
- Vendor Summary Reports
- Vendor Risk Management Report Cards
- Closing Memos

ProcessUnity's cloud-based solutions help organizations of all sizes automate their risk and compliance programs. Our highly configurable, easy-to-use tools significantly reduce manual administrative tasks, allowing customers to spend more time on strategic risk mitigation. As a software-as-a-service technology, ProcessUnity deploys quickly with minimal effort from customers and their IT resources. Our technology delivers faster, better results, and the ability to scale governance, risk, and compliance programs over time. Learn more at www.processunity.com.

Availability and requirements

The Word Connector works with all ProcessUnity applications. It is available as a separately priced add-on subscription and requires a current license for Microsoft Word version 2013 or higher.

The screenshot displays the Microsoft Word interface with the Word Connector add-in. A 'Content Control Properties' dialog box is open, showing fields for 'Title', 'Type', 'Show as', 'Color', 'Locking', and 'Plain Text Properties'. A green arrow points from the 'Type' field in the dialog to the 'Business Continuity/ Disaster Reco' field in the document. The document content includes a header, a summary, a rationale and results section, and a risk register table.

Risk Theme	Risk Expert	Title
Cyber Security	X	IT Security
Data Privacy	F	Ethics & Compliance Principal
Business Continuity Management	Z	Business Continuity Manager
Financial	F	Financial Manager
Ethics, Compliance, Laws and Regulations	D	Ethics & Compliance Senior Analyst
Physical & Environmental Security	Q	Building Operations Director

ProcessUnity properties map to fields within the Word document. These fields are automatically populated using simple, intuitive content control, similar to a mail merge.

For more information, visit www.processunity.com/integration or contact us at info@processunity.com.

