

How to Import Microsoft Word Documents into Smart Docs: A Step-by-Step Guide

If your requirements are documented in Microsoft Word and you're looking to bring them into Modern Requirements' Smart Docs, you're in luck. With the Word Import functionality, Smart Docs allows you to easily convert your traditional documents into structured work items. Here's a detailed step-by-step guide to help you through the process.

Step 1: Identify Heading Levels in Your Word Document

Before importing, it's crucial to understand how your document is structured. Smart Docs uses heading levels to identify and map content to work item types.

Here's a recommended mapping:

- Heading 1 → Section
- Heading 2 → Epic
- Heading 3 → Feature
- Heading 4 → User Story
- Heading 5 → Task

Make sure your Word document is consistently formatted using these heading styles.

Step 2: Ensure Work Item Types Exist in Your Project

Next, verify that the work item types (Section, Epic, Feature, User Story, Task) are available in your current project:

- Go to the Smart Doc module.
- Click the plus (+) icon to check the available work item types.
- If any required type is missing, you'll need to add it to your project before proceeding.

Step 3: Launch the Word Import Functionality

- Navigate to the Smart Doc module in Modern Requirements.
- Open the Word Import tool.
- Upload the Word document you want to import.

Step 4: Create a Rule Set

To properly map headings to work item types, you'll need a Rule Set:

- Click “New” to create a new rule set.
- Name it something relevant (e.g., “Word Import Rules”).
- Begin mapping each heading level to a work item:
 - Heading 1 → Section
 - Heading 2 → Epic
 - Heading 3 → Feature
 - Heading 4 → User Story
 - Heading 5 → Task
 - Set the “Content Mapped to Property” (e.g., Description field).
 - Choose whether to import paragraphs, tables, or both.
 - For traceability, set “Link To” as Related.

Step 5: Save and Apply the Rule Set

- Save your rule set once all mappings are done.
- You can now apply this rule set to your Word document.

Step 6: Import the Word Document

- Return to the Word Import window.
- Select the document and apply your custom rule set.
- Preview to confirm each heading is mapped correctly.
- Click Import to bring the content into Smart Docs.
- Provide a file name and choose a Smart Doc template (custom or basic).

Step 7: Finalize and Review

Once the import is completed:

- Review the imported Smart Doc to ensure all work items have been created as expected.
- Edit or refine any sections directly within the Smart Doc module.

Step 8: Learn More

For advanced configuration and capabilities, download the Rule Set Configuration Guide available on the Discover page within Modern Requirements.

Conclusion

Importing Word documents into Smart Docs streamlines your documentation process and enhances collaboration. By using structured heading levels and custom rule sets, you can transform your legacy documents into dynamic, manageable work items—without losing traceability or context.