






PolicyStat Cheatsheet

TOPIC	QUICK OVERVIEW	KNOWLEDGE BASE ARTICLE
Terminology	Common terms and topics	https://support.policystat.com/hc/en-us/articles/204880595
3 Pillars of PolicyStat	User roles and permissions Policy Areas Approval Workflows	https://support.policystat.com/hc/en-us/articles/205022789
Searching	<ul style="list-style-type: none"> • Search field returns Google-like search results. • Tabs are filters to narrow search results. 	https://support.policystat.com/hc/en-us/articles/204864415
User Notifications	<ol style="list-style-type: none"> 1) User receives email to notify need for action/review 2) Home tab screens 3) Notifications tab (top right) 	https://support.policystat.com/hc/en-us/articles/205071759
Approval Workflows	Sequence of users who review, edit, and approve a PolicyStat document as required by the assigned revision period or edits.	https://support.policystat.com/hc/en-us/sections/201017275
Policies Requiring Approval	<ol style="list-style-type: none"> 1) Bulk Approve (Only if unchanged) 2) Approve/Reject one by one <ol style="list-style-type: none"> a) Show Changes to review 	https://support.policystat.com/hc/en-us/sections/201311610
Collaboration Commenting	Allow users who are not a part of the Approval Workflow to comment and suggest changes. Invite to comment requires a PolicyStat account.	https://support.policystat.com/hc/en-us/articles/204864225
Start Review / Create new version	<ol style="list-style-type: none"> 1. Individual Review or Bulk Review 2. Review/Edit to Make Modifications 	https://support.policystat.com/hc/en-us/sections/115000004530
Create New	<ol style="list-style-type: none"> 1. Create new document using PolicyStat editor 2. Upload from existing Word document 	https://support.policystat.com/hc/en-us/sections/201017285
Attachments / Images	Common attachment types: Spreadsheets, PowerPoints, PDF, images	https://support.policystat.com/hc/en-us/sections/201017365

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PolicyStat Cheatsheet (PolicyStat Editor)

TOPIC	QUICK OVERVIEW	Icon	SUPPORT SITE ARTICLE
Toolbar Overview	An overview of all current toolbar functions	N/A	https://support.policystat.com/hc/en-us/articles/210330633
Numbered Lists	Create and modify numbered lists including style options		https://support.policystat.com/hc/en-us/articles/205714909
Bulleted lists	Create and modify bulleted lists		https://support.policystat.com/hc/en-us/articles/208789226
Hyperlinking	Create hyperlinks to external sites, between two policies or to external pages or forms.		https://support.policystat.com/hc/en-us/articles/210667623
Add Symbol or Special Characters	Add symbols or special characters to a policy.		https://support.policystat.com/hc/en-us/articles/204863985
Insert and Format Tables	Insert new tables and use PolicyStat's formatting features to ensure the desired look and feel.		https://support.policystat.com/hc/en-us/articles/210599823

Frequently Asked Questions About Editor Topics

Lists

<https://support.policystat.com/hc/en-us/sections/201311465>

Hyperlinks

<https://support.policystat.com/hc/en-us/sections/201340465>

Export to Word

<https://support.policystat.com/hc/en-us/articles/204495889>

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