






## PolicyStat Cheatsheet

TOPIC	QUICK OVERVIEW	KNOWLEDGE BASE ARTICLE
Terminology	Common terms and topics	<a href="https://support.policystat.com/hc/en-us/articles/204880595">https://support.policystat.com/hc/en-us/articles/204880595</a>
3 Pillars of PolicyStat	User roles and permissions   Policy Areas   Approval Workflows	<a href="https://support.policystat.com/hc/en-us/articles/205022789">https://support.policystat.com/hc/en-us/articles/205022789</a>
Searching	<ul style="list-style-type: none"> <li>• Search field returns Google-like search results.</li> <li>• Tabs are filters to narrow search results.</li> </ul>	<a href="https://support.policystat.com/hc/en-us/articles/204864415">https://support.policystat.com/hc/en-us/articles/204864415</a>
User Notifications	<ol style="list-style-type: none"> <li>1) User receives email to notify need for action/review</li> <li>2) Home tab screens</li> <li>3) Notifications tab (top right)</li> </ol>	<a href="https://support.policystat.com/hc/en-us/articles/205071759">https://support.policystat.com/hc/en-us/articles/205071759</a>
Approval Workflows	Sequence of users who review, edit, and approve a PolicyStat document as required by the assigned revision period or edits.	<a href="https://support.policystat.com/hc/en-us/sections/201017275">https://support.policystat.com/hc/en-us/sections/201017275</a>
Scheduled Effective Date	Sets a delay during the period between final approval and the document becoming active.	<a href="https://support.policystat.com/hc/en-us/articles/115000238133">https://support.policystat.com/hc/en-us/articles/115000238133</a>
Policies Requiring Approval	<ol style="list-style-type: none"> <li>1) Bulk Approve (Only if unchanged)</li> <li>2) Approve/Reject one by one               <ol style="list-style-type: none"> <li>a) Show Changes to review</li> </ol> </li> </ol>	<a href="https://support.policystat.com/hc/en-us/sections/201311610">https://support.policystat.com/hc/en-us/sections/201311610</a>
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.	<a href="https://support.policystat.com/hc/en-us/articles/204864225">https://support.policystat.com/hc/en-us/articles/204864225</a>
Start Review / Create new version	<ol style="list-style-type: none"> <li>1. Individual Review or Bulk Review</li> <li>2. Review/Edit to Make Modifications</li> </ol>	<a href="https://support.policystat.com/hc/en-us/sections/115000004530">https://support.policystat.com/hc/en-us/sections/115000004530</a>
Create New	<ol style="list-style-type: none"> <li>1. Create new document using PolicyStat editor</li> <li>2. Upload from existing Word document</li> </ol>	<a href="https://support.policystat.com/hc/en-us/sections/201017285">https://support.policystat.com/hc/en-us/sections/201017285</a>
Attachments / Images	Common attachment types: Spreadsheets, PowerPoints, PDF, images	<a href="https://support.policystat.com/hc/en-us/sections/201017365">https://support.policystat.com/hc/en-us/sections/201017365</a>

For additional help, visit [support.policystat.com](https://support.policystat.com) or contact [support@policystat.com](mailto:support@policystat.com). To participate in upcoming webinars, visit <http://learn.policystat.com/lceducation/>

## PolicyStat Cheatsheet (PolicyStat Editor)

TOPIC	QUICK OVERVIEW	Icon	SUPPORT SITE ARTICLE
Toolbar Overview	An overview of all current toolbar functions	N/A	<a href="https://support.policystat.com/hc/en-us/articles/210330633">https://support.policystat.com/hc/en-us/articles/210330633</a>
Numbered Lists	Create and modify numbered lists including style options		<a href="https://support.policystat.com/hc/en-us/articles/205714909">https://support.policystat.com/hc/en-us/articles/205714909</a>
Bulleted lists	Create and modify bulleted lists		<a href="https://support.policystat.com/hc/en-us/articles/208789226">https://support.policystat.com/hc/en-us/articles/208789226</a>
Headings	Increased font sizes, hyperlinked headings, and numbered headings to improve lists		<a href="https://support.policystat.com/hc/en-us/articles/115002194813">https://support.policystat.com/hc/en-us/articles/115002194813</a>
Hyperlinking	Create hyperlinks to external sites, between two policies or to external pages or forms.		<a href="https://support.policystat.com/hc/en-us/articles/210667623">https://support.policystat.com/hc/en-us/articles/210667623</a>
Add Symbol or Special Characters	Add symbols or special characters to a policy.		<a href="https://support.policystat.com/hc/en-us/articles/204863985">https://support.policystat.com/hc/en-us/articles/204863985</a>
Insert and Format Tables	Insert new tables and use PolicyStat's formatting features to ensure the desired look and feel.		<a href="https://support.policystat.com/hc/en-us/articles/210599823">https://support.policystat.com/hc/en-us/articles/210599823</a>

## 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>

For additional help, visit [support.policystat.com](https://support.policystat.com) or contact [support@policystat.com](mailto:support@policystat.com). To participate in upcoming Education session, visit [learn.policystat.com/lceducation/](https://learn.policystat.com/lceducation/)



