

Implementation Dashboard Procedures

Locate the Implementation Dashboard

1. Click the **Admin** tab along the top of your local PolicyStat site.
 - If no Admin tab is present, ensure:
 - You are logged in to PolicyStat as a user.
 - You have elevated permissions as a Site Admin to upload files.
 - Contact your local Site Administrator or support@policystat.com with questions.
2. Click **Implementation Dashboard** (under the **Site Data** column)

Step 1: Upload Files

1. Click the **Upload Files** link in the header.
2. Select the appropriate **Policy Area*** from the initial drop down.
3. If applicable, select the appropriate **Applicability Group**.
4. Click **Browse** to locate the file** for upload.
5. Click **Upload Files**.

Step 2: Assign Attachments

1. Ensure the progress bar shows your status as **2. Assign Attachments**.
2. Review the uploaded files and identify any items to mark as attachments.
3. Click the **Mark as Attachment** button next to the identified attachment file.
4. Locate the parent file (or files) the attachments belong to.
5. Click the **Attach Files** button next to the parent file.
6. Click the drop-down list to locate the appropriate attachment.
7. Click **Attach**.
 - a. To remove an attachment, click the **X** next to the title.
8. Ensure the **Files to Attach** section is clear of any remaining attachments or stub policies before proceeding.
9. Click **3. Set Properties** to proceed.

Stub Policies

Some files are not independent policies, but also are not associated with a parent document. In PolicyStat, these files can become stand-alone attachments called "stub" policies. For example, Excel forms or log sheets, form letters or memos in Word or PDF format, PowerPoint presentations, etc. would be considered stub policies.

When a user clicks a stub policy, the content reads simply: "Please see the attached file."

To designate an attachment as a stub policy, click the **Convert to Stub** button after the file has been marked as an attachment.

Step 3: Set Properties

1. Ensure the progress bar shows your status as **3. Set Properties**.
2. Click to select the files and assign properties.
 - a. Files can be selected one at a time, multiple non-sequential files, or all displayed files.

- b. Click the checkbox at the top left of the table to select all.
3. Use the drop-down lists or text entry boxes to designate the appropriate properties
4. Click **Apply Changes** to assign the properties.
 - a. Changes can be modified prior to submittal if necessary.
5. As needed, delete any file uploads by selecting and clicking **Delete** (next to **Apply Changes**).
6. Click **4. Submit Uploads** to proceed.

Step 4: Submit Uploads

1. Ensure the progress bar shows your status as **4. Submit Uploads**.
2. Click the checkbox in the top left of the table to select all uploads.
 - a. Using Select All selects a maximum of 50 files. If uploading more than 50, click **Select All Uploads**.
3. Review the uploads and click **Submit Checked Uploads** (at the bottom of the table).
4. Click **5. Resolve Duplicates** (optional).

Step 5: Resolve Duplicates

1. Ensure the progress bar shows your status as **5. Resolve Duplicates**.
2. If PolicyStat has identified any policies as similar based on similar file names, they will be designated as duplicates.
3. To avoid duplication of final conversion, please review the uploads. Ensure they are either not duplicates or delete duplicates as desired.

*Terminology may vary based on local preferences.

**The most efficient upload method is a zipped folder containing documents using similar properties (e.g. – Owner, Policy Area, Approval Workflow, etc.).