







EDITOR 101: BASICS QUICK REFERENCE

Topic	Quick Overview	Knowledge base article
<i>Required Properties to Save a Draft</i>	<ul style="list-style-type: none"> Title Owner* Policy Area* Approval Workflow 	Why is my Draft not Saving?
<i>Policy Properties Menu</i>	<ul style="list-style-type: none"> Restricted Visibility: Remove from public view, only accessible to users with View Restricted permissions. Policy is a Form: Removes COPY watermark from printable PDF Reference Tag: Additional categorization options used for searching Next Review: Set by default by Policy Area. modify if needed 	What information is on the Properties Menu of a policy?
<i>Attachments</i>	<ul style="list-style-type: none"> Rename/Replace: Replace updated files as needed Attachments can be any file type desired. 	How do I add a new PDF, image, or other file as an Attachment?
<i>Insert Images from your computer</i>	<ol style="list-style-type: none"> Add local image as an attachment Place cursor in content where image is desired Click Insert Image button in attachments area 	Can I Insert Images into a Policy?
<i>Insert Images from online source</i>	<ul style="list-style-type: none"> Copy the URL (web address) for the image Place cursor in content where image is desired Click Image button on toolbar Paste URL in the pop up window and click OK. 	Can I Insert Images into a Policy? - Online Images
<i>Copy/Paste Text</i>	<ul style="list-style-type: none"> Copy/paste content both within and outside of PolicyStat: Use Ctrl+C / Ctrl+V on your keyboard. Copying external content removes extraneous formatting 	Use The Keyboard (Ctrl + V) to Paste

*Terminology may vary based on local preferences.

Toolbar Overview

The Toolbar features many buttons and functions with which you may already be familiar. For a full breakdown of the Toolbar options with examples, see [this article](#).

Topic	Quick Overview	Icon	Knowledge base article
<i>Find/Replace</i>	<ul style="list-style-type: none"> Locate character, word, or phrase Replace with alternative text if needed/desired 		How do I find and replace text in the Editor?
<i>Numbered Lists</i>	<ul style="list-style-type: none"> Create and modify numbered lists including style options 		How do I add a Numbered List to my policy?
<i>Bulleted lists</i>	<ul style="list-style-type: none"> Create and modify bulleted lists 		What are Bulleted Lists?
<i>Hyperlinking</i>	<ul style="list-style-type: none"> Create hyperlinks to external sites, between two policies or to external pages or forms. 		How do I Link to another Policy, Website, or File from within a Policy?
<i>Add Symbol or Special Characters</i>	<ul style="list-style-type: none"> Add symbols or special characters to a policy. 		How do I add Symbols or Special Characters to my policy?
<i>Insert and Format Tables</i>	<ul style="list-style-type: none"> Insert new tables and use PolicyStat's formatting features to ensure the desired look and feel. 		How do I use tables in PolicyStat?

Want more training?

PolicyStat offers any-time Training Paths on various topics. The [Policy Creation Training Path](#) will guide you through creating a policy in PolicyStat from start to finish.

For additional help, visit support.policystat.com or contact support@policystat.com.

To participate in upcoming Education session, visit our [Webinar Calendar](#) to sign-up. Visit our [Education pages](#) to view training content any time.