

POLICYSAT QUICK REFERENCE


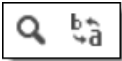

Topic	Quick Overview	Knowledge base article
<i>Terminology</i>	Common terms and topics	What Terms are Used in PolicyStat?
<i>3 Pillars of PolicyStat</i>	User roles, Policy Areas, and Approval Workflows	What are the core concepts of PolicyStat?
<i>Searching</i>	<ul style="list-style-type: none"> • Search field returns Google-like search results • Tabs are filters to narrow search results 	How do I Search for Policies?
<i>User Notifications</i>	<ul style="list-style-type: none"> • User receives email to notify need for action/review • Home tab screens • Notifications tab (top right) 	How Does PolicyStat Alert Users?
<i>Document Life Cycle</i>	<ol style="list-style-type: none"> 1. Draft 2. Pending 3. Active 	What does the document life cycle look like?
<i>Approval Workflows</i>	Sequence of users who review, edit, and approve a PolicyStat document as required by the assigned revision period or edits	What are Approval Workflows?
<i>Policies Requiring Approval</i>	<ul style="list-style-type: none"> • Bulk Approve (Only if changed) • Approve/Reject one by one • Show Changes to review 	How do I Approve a Pending Policy? How do I Edit a Pending Document?
<i>Collaboration and Commenting</i>	Allow users who are not a part of the Approval Workflow to comment and suggested changes, inviting comments requires a PolicyStat account.	Can I Invite Others to Collaborate on a Policy?





<i>Scheduled Effective Date</i>	<ul style="list-style-type: none"> • Sets a delay during the period between final approval and the document becoming active. 	What is Scheduled Effective Date?
<i>Reviewing Policies</i>	<ul style="list-style-type: none"> • Edit to review or start a new draft • Policy Content Tab • Policy Properties Tab • Policy Applicability Tab (if applicable) 	How do I Edit or make Revision to an Existing Policy?
<i>Create New Policy</i>	<ul style="list-style-type: none"> • Create new document using PolicyStat Editor • Upload from existing Word document 	How do I Create a New Policy?
<i>Attachments / Images</i>	Common attachment types: Spreadsheets, PowerPoints, PDF, images	Attachments and Images

**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>Headings</i>	<ul style="list-style-type: none"> • Increased font sizes, hyperlinked headings, and numbered headings to improve lists 		Working with Numbered Headings
<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. The [Site Admin Basics Training Path](#) will teach you how to accomplish the basic tasks associated with the Three Pillars of PolicyStat: Users, Areas, and Approval Workflows.

For additional help, visit hub.rldatix.com/SupportHUB.

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