

PRE-IMPLEMENTATION DASHBOARD QUICK REFERENCE

File Formats

The Dashboard can accept individual files one by one, or through [compressed \(zipped\) folders](#).



The required file format for uploading policies is .doc or .docx (typically Microsoft Word files).



Files in PDF format require additional consideration. Please consult your Site Administrator or PolicyStat Implementation Consultant with questions or concerns about PDF files.



For more information about file naming and attachments, [please see this article](#).

Attachments

- Attachments can be addendums, spreadsheets, PowerPoints, manuals, forms, etc.
- Each attachment should be separated from its parent document into a standalone file.
- Attachments should be clearly named to indicate:
 - The file is an attachment
 - Which parent document it should attach to.

Compressed (Zipped) Folders

- The Implementation Dashboard accepts uploads of individual files or zipped folders.
- Uploading multiple files during one upload requires [creating a zipped folder](#).
- Prior to creating a zipped folder, organize files by [Area](#), [Approval Workflow](#), or [Owner](#) of the document.
- Individual files for upload and/or zipped folders of files should not exceed 20 MB.

For more information on creating a zip file, [please see this article](#).

Logging In

You will receive a log-in from your local Site Administrator or your PolicyStat Implementation Analyst.

Implementation Dashboard Access

Access to the Implementation Dashboard requires Site Administrator permissions. Site Administrator permissions are enabled when the Admin tab is present in the tabs on the top left of your PolicyStat homepage.



Please contact your local Site Administrator or your PolicyStat Implementation Consultant if you need to upload policies but do not have access to the Admin tab in PolicyStat.

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