PolicyStat Working with Word

WORD TO POLICYSTAT CONVERSION

While this process does provide convenience for users who prefer working in a Word interface, a reminder that not all formatting will not transfer to PolicyStat. The following are a few items to consider during import.

Microsoft Word features that will transfer to PolicyStat

- Basic text
- Photos and graphics
- Hylinks to websites, emails, and other documents
- Tables
- Bold text
- Italicized text
- Underlined text*

*PLEASE NOTE: Text that has underlined formatting will transfer, but we advise against using underlined text in your files. Documents in PolicyStat are web pages, and underlined text typically represents text that is hyperlinked. There may be some confusion on the part of your end users trying to click underlined text assuming it to be a link.

If any of the features shown above to do not transfer appropriately to Word, please contact PolicyStat Support at support@policystat.com

### Microsoft Word features that transfer to PolicyStat, but with changes

- Strikethrough on text is removed.
- Font formatting (Heading 1, 2, 3) will transfer, but will not retain colors or font styles.
    - Headings will be set to the PolicyStat standard.
- "Fake" lists that have been created manually in Word will not be recognized as true lists in PolicyStat. For more information, see [see this article.](#)

### Microsoft Word features that will not transfer to PolicyStat

- Comments included during track changes.
- Font colors (other than black).
- Font sizes (outside of headings).
- Tabbed spacing or indents.
- Highlighting.

Exporting to Microsoft Word from PolicyStat
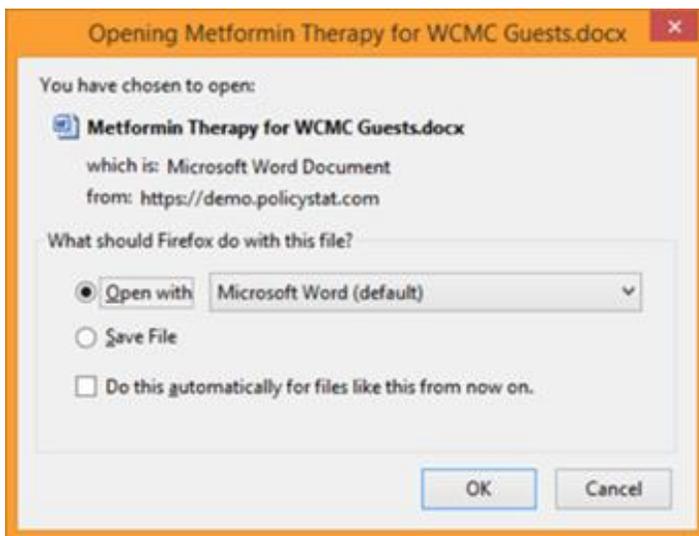
1. To export to Microsoft Word, first click the Edit link in the bar on the top right of the policy.
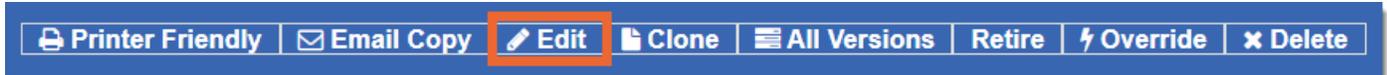

2. Click the Export to Word button.
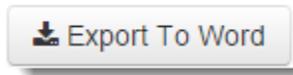
3. A Word document will be created. Depending on local settings and web browser, you may see an option open the file directly, save a copy to your local drive, or an automatic download to the selected folder for downloads.


4. Save/open the Word document, and make edits as desired. Please refer to the conversion details above for additional guidance about formatting.

5. When all edits have been completed, save a copy to your local computer to a location where you know where to find it. A suggested location is to create a folder on your desktop (e.g. - PolicyStat, etc.) for saving all PolicyStat files.

Replace PolicyStat content from Word Document

1. To replace the content in PolicyStat with the changes made in Word, return to the Edit view of the PolicyStat policy, and click the **Replace Content From Word Document button**.
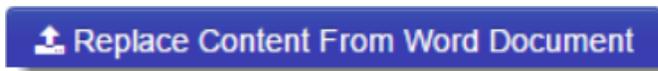
2. Use the **Choose File button** (A) to locate the Word document, and click the **Upload Word File button** (B) when ready.
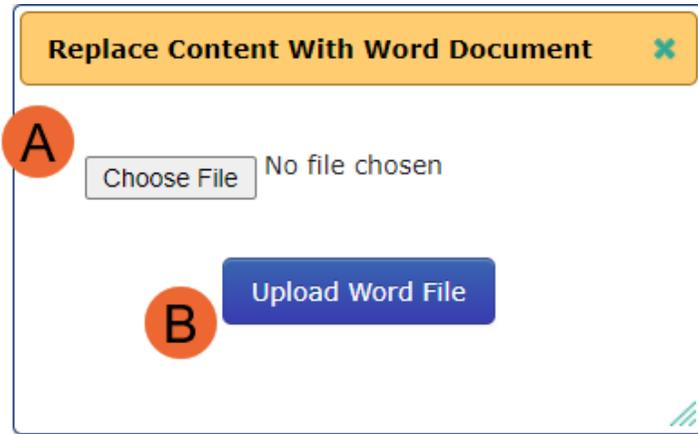
3. The conversion will process changing the Word document to the HTML format required by PolicyStat.

4. When the conversion has been successfully completed, click the **Update Content button** (C) to complete the content update.
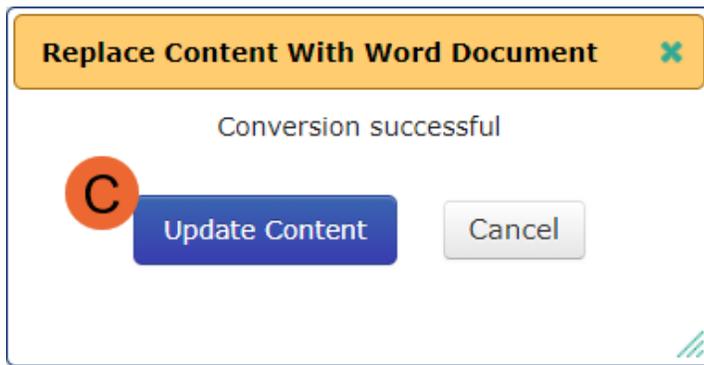
5. It is recommended to review the policy in PolicyStat to ensure the conversion processed correctly and no errors are included.