PolicyStat Quick Reference Links

Topic	*Description*	*Knowledge base article*
Terminology	• Common terms and topics	What Terms are Used in PolicyStat?
3 Pillars of PolicyStat	1. User roles 2. Policy Areas 3. Approval Workflows	What are the core concepts of PolicyStat?
Searching	• Search field returns Google-like search results • Tabs are filters to narrow search results	How do I Search for Policies?
User Notifications	• User receives email to notify need for action/review • Home tab screens • Notifications tab (top right)	How Does PolicyStat Alert Users?
Document Life Cycle	1. Draft 2. Pending 3. Active	What does the document life cycle look like?
Approval Workflows	• Sequence of users who review, edit, and approve a PolicyStat document as required by the assigned revision period or edits	What are Approval Workflows?
Policies Requiring Approval	1. Bulk Approve (Only if changed) 2. Approve/Reject one by one 3. Show Changes to review	How do I Approve a Pending Policy? How do I Edit a Pending Document?
Collaboration and Commenting	• 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?
Reviewing Policies	• 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?
Create New Policy	• Create new document using PolicyStat Editor • Upload from existing Word document	How do I Create a New Policy?
Attachments / Images	• **Common attachment types**: Spreadsheets, PowerPoints, PDF, images	Attachments and Images

**Terminology may vary based on local preferences.*

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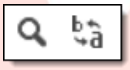
Toolbar Overview

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*
Headings	• Increased font sizes, hyperlinked headings, and numbered headings to improve lists		Working with Numbered Headings
Find/Replace	• Locate character, word, or phrase • Replace with alternative text if needed/desired		How do I find and replace text in the Editor?
Numbered Lists	• Create and modify numbered lists including style options		How do I add a Numbered List to my policy?
Bulleted lists	• Create and modify bulleted lists		What are Bulleted Lists?
Hyperlinking	• 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?
Add Symbol or Special Characters	• Add symbols or special characters to a policy.		How do I add Symbols or Special Characters to my policy?
Insert and Format Tables	• Insert Table: 1. Place cursor in paragraph box 2. Click Table button from toolbar • Right click to: • Adjust table properties • Insert/delete rows/columns • Format cells		How do I use tables in PolicyStat?

For additional help, visit the RLDatix Customer Portal or the RLDatix Public Knowledge Base.

To participate in upcoming Education session, visit our Webinar Calendar to sign-up. Visit our Training pages to view training content any time.

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