PolicyStat Editor Quick Reference

Topic	*Overview*	*Knowledge base article*
Required Properties to Save a Draft	• Title • Owner* • Policy Area* • Approval Workflow • **Review Date**: Set by default by Policy Area. modify if needed	What information is on the Properties Menu of a policy?
Additional Properties	• **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	How do I add Reference tags? How do I restrict policy visibility or access?
Attachments	• **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?
Insert Images from your computer	• 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?
Insert Images from online source	• 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
Copy/Paste Text	• 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.*

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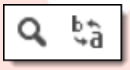
Toolbar Overview

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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