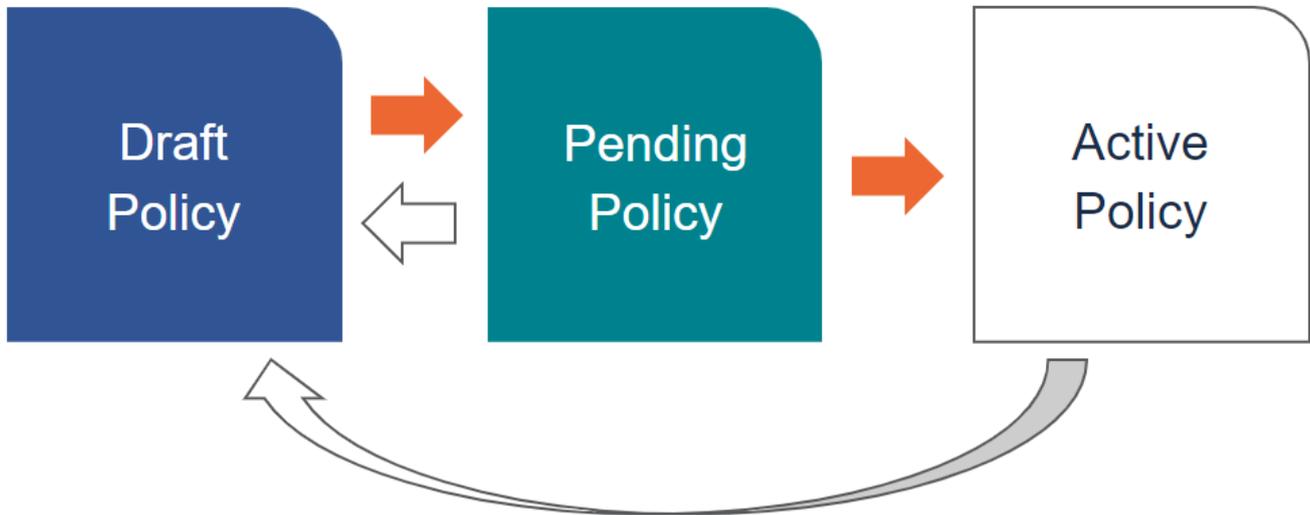


Document Life Cycle Quick Reference

At its simplest, the life cycle of a document in PolicyStat progresses through three stages:



1. An Owner creates a new **Draft** in PolicyStat by either importing a document from Microsoft Word or creates a new draft through the PolicyStat Editor.
2. When the draft is ready for review, the author/owner pends it for approval to begin the **Pending** phase and the Approval Workflow.
3. When the pending document completes the Approval Workflow, it becomes active and is searchable by any PolicyStat.

<i>Topic</i>	<i>Overview</i>	<i>Knowledge base article</i>
<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>	<ol style="list-style-type: none"> 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?

<i>Access to Pending or Draft Versions</i>	<ol style="list-style-type: none"> 1. Click link in the notification email. Or, 2. Click the button above the title in the active/pending version 	<u>Where Do I Find Pending and Draft Policies?</u>
<i>Inviting Collaborators</i>	<p>Inviting users to review who are not a part of the Approval Workflow</p> <ol style="list-style-type: none"> 1. Locate comments area at the bottom of the Pending Policy 2. Enter comments. 3. Invite collaborators by: <ol style="list-style-type: none"> a. Entering username or user group in the Invite a user or group area b. Use the @mention feature to direct comments at a specific user in the comment field 4. Invited collaborators will be able to: <ol style="list-style-type: none"> a. View the pending version of the policy b. Comment on the policy c. View all comments made as part of the discussion d. Invite others to collaborate 5. Invited collaborators cannot: <ol style="list-style-type: none"> a. Modify the text of the policy b. Restart the Workflow 	<u>Can I Invite Others to Collaborate on a Policy?</u>
<i>Commenting on a Pending Policy</i>	<ol style="list-style-type: none"> 1. Locate comments area at the bottom of the Pending Policy 2. Enter comments and click the Add Comment button 3. Notifications are sent to all other users involved in the policy each time a new comment is added - return to the policy as needed read and review comments 	<u>Can I Comment on a Pending Policy?</u>
<i>Reviewing Policies</i>	<ul style="list-style-type: none"> • Edit to review or start a new draft • Policy Properties section • Policy Content section 	<u>How do I Edit or make Revision to an Existing Policy?</u>

For additional help, visit [the RLDatix Customer Portal](#) or the [RLDatix Public Knowledge Base](#).