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**

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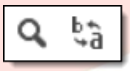
**Terminology may vary based on local preferences.*

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**.

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