

Hello everyone and welcome to Editor 201: Advanced. This video focuses on advanced features for working with the PolicyStat Editor. A quick disclaimer that some specific terms may differ for your location, but the concepts are universal.

My name is Sean Munro, and I am a part of the Training team at PolicyStat.

Let's take a look at the Editor. Here, we have a pre-saved draft policy we'll be using. If you're not sure about how to access or save drafts, we recommend checking out our video: Editor 101: Basic.

To create a bulleted list from scratch, place your cursor within a paragraph box and press the Insert/Remove Bulleted List button from the toolbar. Type text and press return to create the next bullet, just like you are probably familiar with in Microsoft Word.

To break out of the list, press Enter once to create a new bullet, then a second time to break out of the list.

To indent a list item by a level, use the indent button from the toolbar. Outdent is right next to it, and can be used to adjust the level back if desired.

Numbered lists work much the same as bulleted: Place your cursor inside the paragraph box then press the Insert/Remove Numbered List button from the toolbar, then type your text.

If you have existing text you would like to convert to a list, place your cursor anywhere around the text and click the Insert/Remove Numbered list button. If an existing list precedes your list, it will join the existing one. If you'd like it to begin a new list, place your cursor at the end of the previous list, place a space between the two lists by breaking out of the first.

Fake lists are something new Editor users may have challenges with due to differences from Microsoft Word. A fake list occurs when the list ordering functions aren't used to create the list. Sometimes a user will put in spaces instead of tabbing or just have numbers in a list. The information may look like a list but when we bring it into PolicyStat we discover that it wasn't created using the list functions.

If you type 1. in Word, the autocorrect program predicts and presumes that you are likely trying to create a list and automatically opens a list for you.

PolicyStat does not auto predict that you may need a list, so it does require clicking the list button. The reason this is important to recognize is that with a fake list, the list items are not actually connected. Looking at this list of directions for the PolicyStat office coffee maker, if we get a new machine that requires a new step in between steps 3 and 4, the numbering will not update. On a four to five step process, it's not a deal breaker. With an extensive list full of sub-points as is true for many policies and legal documents, failing to update numbering can be quite problematic.

To convert this fake list to real, highlight all of the list items and click the Insert/Remove Numbered list button. This automatically converts the selected text to a list. If desired, come back and clean up the existing numbering.

The default numbering style is A, B, and C but PolicyStat offers four other formatting options from the Numbering menu. Place your cursor in the list, and click an option from the menu to adjust. If you need to change styles, choose another option; no additional steps required.

Next up is tables. To insert a table, set your cursor in a new paragraph box and click the Table button on the toolbar.

From the Table Properties menu, modify the default number of rows and columns, and set your header preferences. Setting cells as headers aligns the content in the center and applies bold formatting. This can be applied to either the first row, the first column, or both. We'll look at what that looks like in a moment. The new table can also be assigned a caption or add a summary. A table summary is a feature to assist users who may be using assistive technology like a screen reader to understand what is displayed.

Click OK to generate the table, and populate some filler content. In the example below, you can see how the headers display for rows or columns.

To resize the table, hover the cursor on the line between two columns and it will change to a double arrow. Click and drag to expand the width of the table.

Insert new rows or columns, right click to open a menu. Rows or columns can be inserted before or after the existing row/column. Use the same right-click menu to delete. To fully remove the table, click Delete Table. If you need to review the Table Properties menu, it's at the bottom of this list.

Adjust individual cells through the right click menu as well. Merge adjacent cells, and split either horizontally or vertically.

Individual cell properties can also be defined in this menu. If desired, the height and width can be set by pixel. This can be a little tricky, so using the drag and drop resizing is the strongly recommended option. Word wrap is set by default so that if the text extends beyond the width of the screen it will wrap back. To remove this option, set this as no. The text alignment can also be adjusted here based on horizontal or vertical needs. These settings are applied in the cell alignment table example.

PolicyStat policies are live web pages so it may be helpful to understand how hyperlinks work so you can connect policies to other policies or other external web pages.

Hyperlinks in PolicyStat are another function that may work a little differently from Microsoft Word.

Word will recognize a web address and automatically convert it to a hyperlink.

PolicyStat requires an extra step to convert text to links. With the text entered, highlight the link text, and click the Link button from the toolbar. Type or paste the URL inside the box and click OK. It's looks alright, but when creating a link it's a good practice to test to ensure it works appropriately. We'll scroll to the bottom and click Preview.

The same concept applies for creating a link using regular text. We'll highlight the Learning Center text and type or paste the URL. Again, we'll preview to ensure it works.

If you have a particularly long policy, it can be helpful to create a table of contents or the ability to jump to specific sections of a policy. PolicyStat also allows you to link within the policy by using an anchor link. To do so, first set the anchor.

We'll place the cursor within the "Other" header in this content and click the Anchor flag. Give the anchor a name (we'll use Other) and then scroll back up to generate a link to the anchor.

Highlight the text and click the link button. This time, we will click the Link Type drop-down and choose Link to anchor in the text. Select the Anchor name we just created and click OK. Preview and test to make sure it works, and clicking the linked text jumps you to the anchored section in the text.

If there is a specific person, or support address to contact with questions from a policy, you can also add an email contact link. Select the text, click Link, and choose E-mail from the drop-down list. Add the email you'd like to send to. If desired, you can pre-populate a message subject or body text. Click OK, and we'll test this one too. PolicyStat uses Gmail as our default email client, but if your facility uses another email service like Outlook it will populate a new message with that program.

Finally a review of a few advanced formatting options:

By default, new text boxes use the paragraph style format. To format using headings, select any of the Heading options from the Formatting drop down menu.

There are also a few important things to know about using Heading formatting options.

First is that Heading content automatically populates the Table of Contents. This menu floats on the left side of the screen both here and in the final Active version of the policy, and it allows your end users to quickly navigate between headings and subheadings.

The next thing to note, is that in the Active version of a policy, Headings also carry what we call Deep Section Links. When the button at the end of the heading is clicked, it captures the link to not only the policy being viewed, but also to the heading in question. It's a great way to direct a colleague to the right section of the right policy through one click. It works in a similar fashion to Anchor Links, but it generates automatically on every policy, and can be shared with others even more easily.

And finally, headings can also be numbered. This feature can be prove helpful for long policies with extensive lists. Rather than using the traditional list style where important information may get buried deep within the list, numbered headings draws attention to important list items

With normal text formatting, the browser may not necessarily respect proper white spacing or line breaks as desired. The Formatted option ensures that all white spaces or line breaks will be respected. This can be helpful especially when working with chemical equations.

The Blockquote option provides a special indent to call out quoted text if a reference is needed.

To center align text, set the cursor in the text box and click the center align button in the toolbar.

To apply highlighting, select the desired text and choose the Highlight button from the Editor toolbar.

If you are not ready to be done, ensure the draft is saved with the latest changes and close it out. You can always reopen the draft from the home tab, using the Drafts link. Click Edit to open the draft and resume editing.

If changes are completed, locate the Start Approval Process button at the bottom of the policy. You will need to provide a short summary of the changes you made to the policy and click Start Approval Process.

This concludes our coverage on Editor 201: Advanced in PolicyStat.

Please download the handout for this video using the link below, as it has links to articles which review the information discussed here. At any time, you can also click the Help button in the bottom corner of any screen within PolicyStat and search our Learning Center articles directly. If you don't find what you're looking for, or need additional assistance, click the Contact Us link to generate a new support ticket for our team.

Thanks for being a PolicyStat Customer and thanks for watching.