This video focuses on essential elements for creating and saving a draft policy using the PolicyStat Editor.

To start things off, who has access to the PolicyStat editor?

If a user is an Approver, and therefore is a member of an Approval Workflow, they will have access. If they need to make any changes to a policy as part of their review, they have the ability to do so.
Any user assigned as the designated Owner for a policy will have editor access.
If a user has Area Editor permissions and has access to create a new or edit an existing policy for an Area, (or potentially site-wide) will have access to the editor.
If a user is an Area Manager with have the ability to create, edit, and manage new or existing policies within their Area, they will also have access to the editor.
And finally, Site Administrators will have the ability to create new policies or edit existing policies for any area across the site.

As part of the lifecycle for a policy, anytime the editor is accessed from an active or pending version, a new draft is created. The pending and active versions of the policy will still exist but once the draft is either pended for approval or completes the workflow, the revised version replaces the existing.

So let’s start by looking at how to access the Editor. When viewing an existing policy where you have permissions to Edit, clicking the Edit button on the blue toolbar opens the draft view with the editor.

From the Home tab, users who are Area Editors or above will have the ability to create a new policy using either the Create Policy button or the Upload from Word options.

Also on the Home tab is the ability to access any saved drafts.

Every policy in PolicyStat is comprised of two parts: the content tab and the properties tab.
The content tab contains the Editor and is where the policy’s content is defined.
The properties tab contains information about the policy’s properties to assist with categorization and defining review periods.

Before we dig into the Editor, you may notice the red box in the top right corner of the screen representing the autosave feature. This is currently red, meaning any work on this draft has not been saved. In order to save this draft, a few properties need to be defined.

First, from the content tab, each policy needs to have a title. We’ll call this one Editor 101: Basics
Next, on the properties tab, each policy needs to have an owner. As we created this new draft, we are the assigned owner of this policy. This can be changed at any time by deleting the existing user and assigning a new owner.
Each policy also needs an Area and Approval Workflow assigned. Best practice and ease of use suggests that both the Area and the Approval Workflow should use the same name, but that is a local decision. We’ll set this as Training for both instances.

With these properties defined, the draft will now be saved. Each time a modification is made, a red box signals that changes have not saved and green indicates that they have. Autosave should activate every few seconds, but if you need to save before it kicks in, the Save Now button is always available at the bottom of the policy.

The review period is also listed as required. This typically is set by default based on the Area, but can also be modified if needed on each policy.

Just below is where Reference tags can be added. Reference tags are terms, numbers, or phrases that your facility defines to categorize and search for similar policies across any area.

There are a few advanced properties to address:

The default print option for a policy includes a "COPY" watermark. If a document is to be used as a form, meaning it is printed frequently, the Hide PDF Watermark option removes this watermark from the printed version.
The default setting is that all policies will be viewable by all users. If you would need to restrict visibility to users, say for example only visible by Human Resources staff, restrict visibility using this radio button.

When working within the PolicyStat Editor to create content, you'll find many similarities to working in Microsoft Word.

Adding new and deleting existing text is the same.
Applying bold or italics formatting to text with bold or italics also works the same
If you make a mistake the undo feature can reverse the last action taken

As PolicyStat is a web based editor, there are a few items that are different.

Within the PolicyStat Editor, text is captured inside text boxes. Word has no visible lined boxes, but the actual experience of entering is the same as what you would experience in PolicyStat.

It's worth noting that the final output does not contain any lined boxes surrounding the content.

Fonts within PolicyStat are restricted to one style and color, and no alternative fonts are allowed.

As mentioned, formatting like bold, italics, or highlighting can be applied to individual text within a text box, but applying header formatting affects all of the content. So creating a new text box is likely the best preference when using headers.

One final difference is that images need to first be uploaded as attachments before they can be placed inside the content. This is because our Editor is web-based, so images and other files will need to be stored online as attachments. Once they are attached, images can be inserted into the content.

To add new text within the editor, simply place your cursor and start typing.

To delete the text, place the cursor and hit either backspace or delete on your keyboard.

Copying and pasting text within PolicyStat occurs with no problem.

Copying text from outside of PolicyStat brings over the content, but does strip out any extraneous formatting.

This Word document features a variety of different font colors and formatting. Let's copy the content and paste it within the Editor.

The content, sizing, links, and list from the Word doc has been carried over with no problems. However, all colors and font formatting have been stripped to maintain consistency.

Basic formatting like Bold or Italics can be applied either via the toolbar or keyboard shortcuts. Subscript and superscript can also be applied to numbers or letters.

Attachments need to be stored on a web server to display. The same process is true when adding images, but I'll first cover the process for non-image attachments.

Attachments can be PDFs, spreadsheets, or most other file types as long as they are under 20MB in size.

To upload an attachment, browse to locate the file wherever it is stored, and click Upload Attachment. We recommend giving the attachment a recognizable name to make it clearer to end users what type of content the attachment contains. File names often make sense for storage, but not necessarily for end users.

In the final version, attachments appear at the bottom of any policy.

Images work just the same way. Browse, Open, provide a name, and Upload. When an image is uploaded, PolicyStat will recognize that the file is an image based on its file type and provide an additional Insert Image button.

Determine where in the content the image should go. This often requires creating a new paragraph box to contain the image. Place your cursor, then scroll back to the top.

Click Insert Image and the image is inserted into the content.

Another option is to insert an image that is preloaded and available on the Internet. Copy the URL or web address of the file. Set your cursor where you'd like the image to go, and click the Image button from the toolbar. Paste the URL into the appropriate pop-up location. We also recommend adding Alternative Text, which is a descriptor that appears if the image fails to load for any reason. You can adjust the sizing and the alignment, and add a caption if desired. Click OK, and the image will appear in the content.

We also feature both find and replace tools. Click the magnifying glass icon and enter your search terms. To further filter your searches, check the Match case option or Match whole word. Click find to identify the first instance and again for each subsequent instance.

Replace works much the same way. If you have the Find window already open, click the Replace tab. If not, click the Replace icon from the toolbar. Enter a term you'd like to find and what word to replace it with. Clicking it once locates the word and a second time replaces the word. You can also click Replace All to change all instances at once.

When changes are completed, locate and click the Start Approval Process button at the bottom of the policy.

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.