

Working with Word

Hello everyone and welcome to Working with Word. This video focuses on exporting content from the PolicyStat Editor to Microsoft Word and re-importing after modifications have been made. For more specific information on using the PolicyStat Editor, you'll want to check out our Editor 101: Basics and Editor 201: Advanced videos in the Learning Center.

Before we dig into a PolicyStat policy, let's take a look at what will transfer from Word, what may transfer with challenges, and what will not transfer.

Standard text will transfer directly to PolicyStat without a challenge.

Images inside documents will also transfer to PolicyStat as is.

Functional hyperlinks or hyperlinked text within the original documents will transfer to PolicyStat. We do like to specify that they will need to be functional in Word in order to work within PolicyStat. If they don't work in the original document, they will not work in PolicyStat either.

An established table within the original document will transfer to PolicyStat.

Text with bold formatting or italicized formatting imports correctly into PolicyStat.

Text that has underlined formatting will transfer, but in general we advise against using underlined text in your files. This is because documents in PolicyStat are web pages, and underlined text typically represents text that is hyperlinked. There may be some confusion on the part of your end users trying to click underlined text assuming it to be a link. Better options are to italicize or bold the text.

Lists transfer from Word to PolicyStat, assuming they are formal lists within Word. This caveat is necessary, because there are some instances where lists are created without an actual connection between the list items, they will not transfer as a list into PolicyStat. If the list is connected, it will import without a challenge. For more about Fake Lists, I recommend checking out the Editor 201 video.

There are a few formatting options that transfer to PolicyStat from Word but may not transfer quite the same.

Struck through text will have the strikethrough removed and will appear as regular font on import.

In addition, text using different font styles, colors, sizes or other similar formatting changes will be reset to the PolicyStat standard paragraph sans serif font. This is done intentionally, and is designed to keep the look of content consistent across all documents on your site. It is worth noting that Headings will carry over retaining the larger size, but any extraneous colors and font styles will be removed.

Comments made to a Word document, typically used during a Track Changes review, will not transfer to PolicyStat. To learn more about the PolicyStat commenting and collaboration features to suggest changes during a document, I recommend watching Collaboration and Commenting video also from the Learning Center Education page.

So let's take a look at the process within PolicyStat to export the Editor content from PolicyStat to Word.

First, exporting to Word requires access to the Editor. If you do not have a role or permission that allows access to the Editor, check with your Site Administrator.

Click Edit to open the PolicyStat Editor, then Export to Word. Depending on the browser and local settings, you may be asked if you would like to open it directly in Word, or download a copy first. Either way, open the Word file.

When a Word document is downloaded from the Internet, Microsoft Word initially restricts editing until you click Enable Editing from the top yellow bar.

With the document open, we can add additional text, remove existing text, add images and tables.

Save any changes on the Word document to your local computer. If you're working with multiple files in PolicyStat, we recommend creating a folder on your desktop for those files and have them easy to access.

Before we replace the PolicyStat content with the Word content, it's worth noting a few things:

If you are collaborating on a document that you export to Word other users can edit the PolicyStat document and those changes will **not** be reflected in the exported version.

When uploading the Word document back into PolicyStat any changes made in the original document will be overwritten by the uploaded Word document.

Returning back to PolicyStat, click Replace Content from Word Document, then Browse to locate the file and Upload Word File.

You will be notified that the conversion was successful, then click Update Content to complete the process.

The changes we made in Word have successfully transferred to PolicyStat. To review those changes, scroll to the bottom and click Preview.

Click Show Changes, and review the changes made with the revised content. All deleted text is struck-through in red, and all newly added text is underlined and green.

If desired, you can also copy and paste text directly from the Word document into PolicyStat.

Highlight and copy the text from the Word doc. We can select all the text at once, or copy by paragraph. The first paragraph uses non-standard font, stylized formatting, and varied sizing. Switch back to PolicyStat and paste the text. The easiest method for pasting is using Ctrl + V on your keyboard. It is possible to right click and paste, but you will be required to paste twice using this box.

Hyperlinks can copy over directly, as do properly formatted lists.

If you have an image, that is one item that cannot directly copy over from Word. As images are treated as attachments in PolicyStat, they do need to be uploaded and inserted.

However, if you have a full document in Word that does not already exist in PolicyStat, you can also create a new policy by uploading the Word file.

Starting at the home tab, click the Upload file button on the right side of the screen. Browse to locate your file, then click Create from Upload.

Once the conversion runs its course, it will become a new draft in PolicyStat. As you can also see, during the formal upload process for the full Word doc the image is inserted. Before we can move away, there are a few properties that need to be added to ensure the draft is saved. The title is pre-populated using the file name. In addition, on the properties tab, we need to assign an Area and Approval Workflow. In general we recommend using Areas and Approval Workflows containing the same name, but that may be a local decision. With those settings in place, the draft is now saved.

Though there is the ability to export to Word, it is not recommended best practice in PolicyStat. The best practice option will always be to work inside the PolicyStat editor to ensure the content matches the desired outcome.

With all this said, some organizations choose to disable the ability to export or upload Word documents. Site administrators can disable the function by going to the Admin tab under the Site Configuration link. Next go to the Other tab and you will see a checkbox that if unchecked will disable the Word function.