

Zippping Files for Upload

Documents can be uploaded during Implementation one by one, but a more efficient method is zipping the files.

Before zipping, let's first look at our documents.

The preferred file format for uploading at PolicyStat is .doc or docx. These are commonly Microsoft Word files and provide the cleanest import. Other file types like spreadsheets and graphics can be included in the zip but cannot be converted to policies.

For best results, group your files so that all policies, stub policies, and attachments are within the same folder. This will ease the process of uploading, which is done by Area.

Return to your document folder location.

By creating a zip file, all documents in this folder will be treated as a single file for upload.

Right-click the folder. Hover your cursor over Send To so the sub-menu displays. Click Compressed (Zipped) folder.

The folder is now zipped and is ready for import.