

PolicyStat Editor Quick Reference


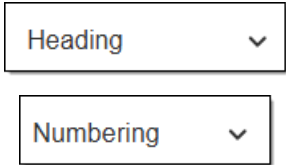






Topic	Overview	Knowledge base article
Required Properties to Save a Draft	<ul style="list-style-type: none"> Title Owner* Policy Area* Approval Workflow Review Date: Set by default by Policy Area. modify if needed 	What information is on the Properties Menu of a policy?
Additional Properties	<ul style="list-style-type: none"> Restricted Visibility: Remove from public view, only accessible to users with View Restricted permissions. Policy is a Form: Removes COPY watermark from printable PDF Reference Tag: Additional categorization options used for searching 	How do I add Reference tags? How do I restrict policy visibility or access?
Attachments	<ul style="list-style-type: none"> Rename/Replace: Replace updated files as needed Attachments can be any file type desired. 	How do I add a new PDF, image, or other file as an Attachment?
Insert Images from your computer	<ol style="list-style-type: none"> Add local image as an attachment Place cursor in content where image is desired Click Insert Image button in attachments area 	Can I Insert Images into a Policy?
Insert Images from online source	<ol style="list-style-type: none"> Copy the URL (web address) for the image Place cursor in content where image is desired Click Image button on toolbar Paste URL in the pop-up window and click OK. 	Can I Insert Images into a Policy? - Online Images
Copy/Paste Text	<p>Copy/paste content both within and outside of PolicyStat:</p> <ul style="list-style-type: none"> Use Ctrl+C / Ctrl+V on your keyboard. Copying external content removes extraneous formatting 	Use The Keyboard (Ctrl + V) to Paste

**Terminology may vary based on local preferences.*



Toolbar Overview

The [Editor Toolbar](#) features many buttons and functions with which you may already be familiar.

Topic	Overview	Icon	Knowledge base article
Basic Formatting	Bold, italicize, underline or highlight text.		Are there Options to Change Font Size?
Headings	Increased font sizes, hyperlinked headings, and numbered headings to improve lists.		Working with Numbered Headings
Find/Replace	Locate character, word, or phrase with the option to replace with alternative text if needed/desired.		How do I find and replace text in the Editor?
Lists	Create and modify numbered or bulleted lists, including style options.		Including Lists in my Policy Content
Hyperlinking	Create hyperlinks to external sites, between two policies or to external pages or forms.		Hyperlinks Section
Special Links	Create hyperlinks to headings, clickable phone numbers, emails, or specific points in your document.		Hyperlinks Section
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	Use the table button to insert a new table and the dropdown menu to adjust table properties.		How do I use tables in PolicyStat?



Editor AI Tools



PolicyGen AI Assistant

The PolicyGen AI Assistant is a generative AI tool designed to help create and update policies quickly, while ensuring they meet the requirements of the policy owner. Instead of starting from scratch, clinical staff can focus on reviewing and refining policies, reducing workload and improving efficiency.

How it Works

1. Policy owner provides key details
2. AI generates a structured, compliant policy draft
3. Policy owner reviews the draft, edits content, and submits for approval

Policy Content Translation

Using PolicyStat AI, you can translate sentences, sections, or even entire policies into other languages. Highlight the content you wish to translate, select your target language from the dropdown, and then choose to insert the translation or replace the original after the process runs.

Available languages include English, British English, Spanish, French, Canadian French, Arabic, and German.

For more information on Editor AI tools, [visit this section of the knowledge base](#).

For additional help, visit the [RLDatix Support Portal](#) or the [RLDatix Public Knowledge Base](#) to view knowledge articles or contact our Support team.

