

Employee Policy

Overview

The **Employee Policy** feature allows administrators to create and manage policies that apply to employees within a property. Policies can be used to define organizational, management, or other employee-related rules and guidelines.

Each policy can be associated with a **Property, Policy Category, User Role, Version, and Policy Type**. Administrators can also define the policy content, description, and settings such as whether the policy is mandatory, downloadable, or requires a signature.

The Employee Policy feature provides a centralized place to maintain employee policies and control how they are presented to employees.

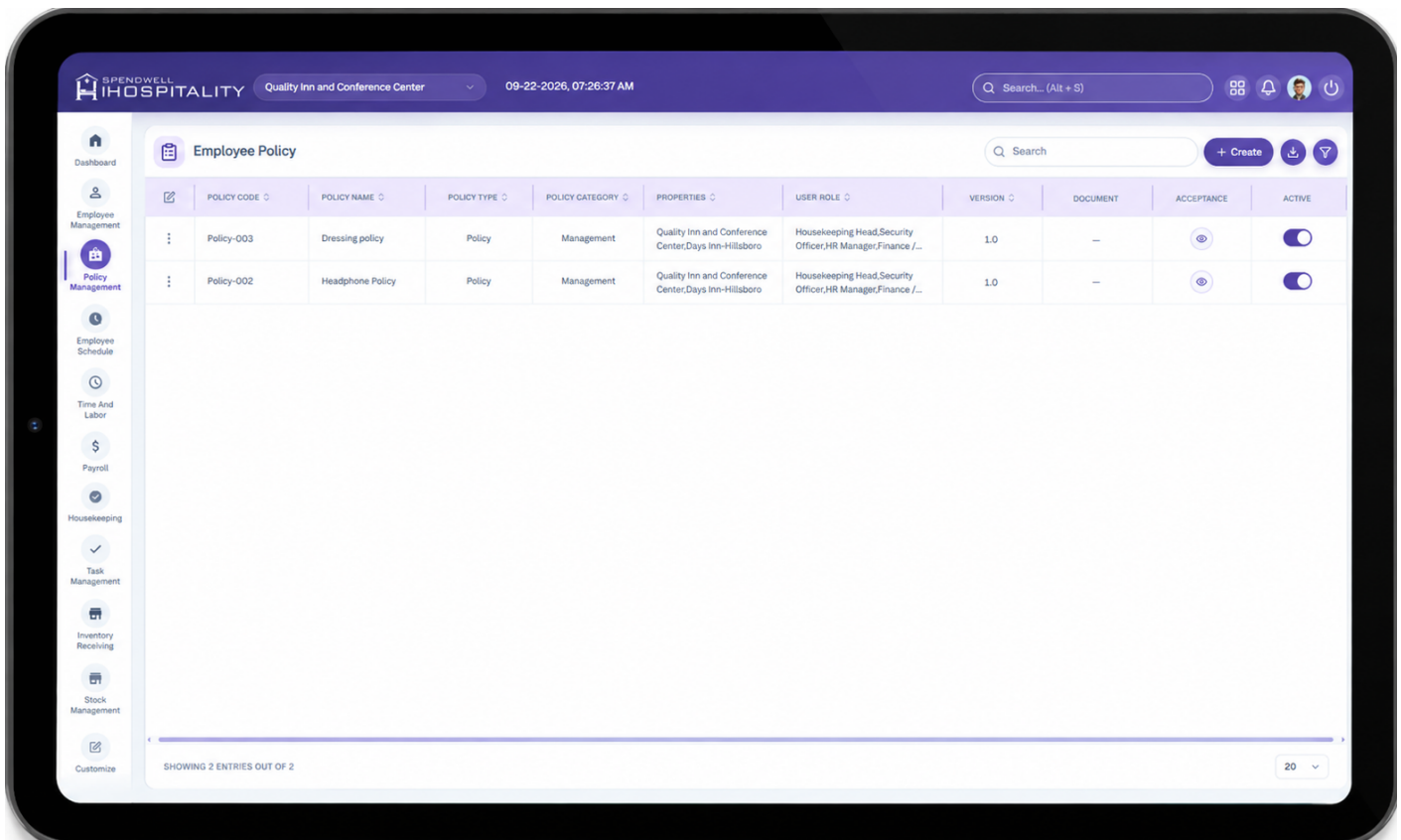
Employee Policy Screen

The **Employee Policy** screen displays all configured employee policies along with their key details and status.

The screen includes the following information:

- **Policy Code** — Unique code assigned to the policy.
- **Policy Name** — Name of the employee policy.
- **Policy Type** — Type of policy configured.
- **Policy Category** — Category under which the policy is organized.
- **Acceptance** — Provides access to view the policy acceptance information.
- **Active** — Toggle to enable or disable the policy.
- **Version** — Indicates the current version of the policy.
- **Document** — Displays the associated policy document, if available.
- **Properties** — Shows the property to which the policy is assigned.
- **User Role** — Shows the user role for which the policy is applicable.

Administrators can use the **Create** button to add a new employee policy.



Key Fields

Policy Details

- **Policy Code** — Unique code used to identify the employee policy.
- **Property** — Property for which the employee policy is being created.
- **Policy Category** — Category used to classify the policy, such as Corporate or Management.
- **Policy Type** — Defines the type of policy being created.
- **Policy Name** — Name or title of the employee policy.
- **User Role** — User role to which the policy applies.
- **Version** — Version number of the policy used to identify revisions or updates.

Policy Content

- **Policy Document** — Allows an administrator to upload a document associated with the policy.
- **Description** — Short description explaining the purpose or scope of the policy.
- **Policy Content** — Rich-text editor used to enter and format the actual policy information. It supports formatting options such as fonts, font size, bold, italic, underline, alignment, lists, and quotations.

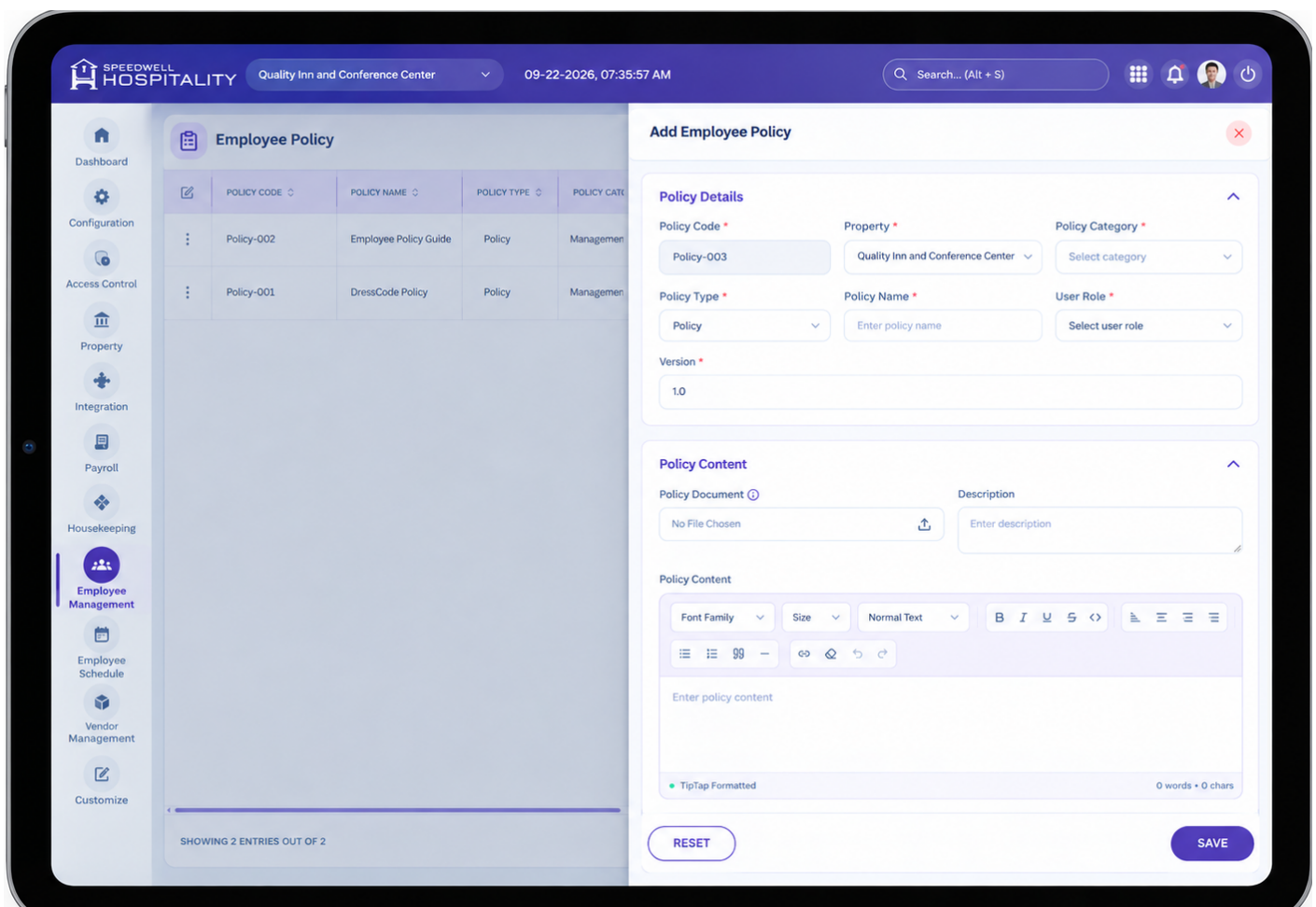
Policy Settings

- **Download Allowed** — Allows employees to download the policy document or content.

- **Is Mandatory** — Marks the policy as mandatory for the applicable employees.
- **Signature Required** — Indicates that employees are required to provide a signature or acknowledgement for the policy.
- **Show Policy On** — Defines where or during which employee process the policy should be displayed, such as **Employee Onboarding**.

Actions

- **Save** — Saves the employee policy and closes the panel.
- **Save & Add New** — Saves the current policy and keeps the panel open to create another policy.
- **Reset** — Clears the entered values without saving.
- **Create** — Opens the **Add Employee Policy** panel.



Steps

Create an Employee Policy

1. Navigate to **Employee Policy** from the Employee Management section.
2. Click the **Create** button.

3. The **Add Employee Policy** panel opens.
4. In **Policy Details**, enter the **Policy Code**.
5. Select the required **Property**.
6. Select the **Policy Category**.
7. Select the **Policy Type**.
8. Enter the **Policy Name**.
9. Select the applicable **User Role**.
10. Enter the **Version** of the policy.
11. In **Policy Content**, upload a **Policy Document** if required.
12. Enter a **Description** for the policy.
13. Enter the policy information in the **Policy Content** editor and apply the required formatting.
14. In **Policy Settings**, enable **Download Allowed** if employees should be permitted to download the policy.
15. Enable **Is Mandatory** if the policy must be followed or acknowledged by the applicable employees.
16. Enable **Signature Required** if employee acknowledgement through a signature is required.
17. Select the required option in **Show Policy On** to determine where the policy should be displayed.
18. Click **Save** to create the policy.
19. Use **Save & Add New** to save the current policy and immediately create another policy.
20. Use **Reset** to clear the entered information without saving.

Important Notes

- **Policy Code, Property, Policy Category, Policy Type, Policy Name, User Role, and Version** are required when creating an employee policy.
- A policy can be associated with a specific **Property** and **User Role**.
- The **Version** field should be updated when significant changes are made to an existing policy.
- **Policy Document** can be uploaded when a separate document needs to be associated with the policy.
- **Is Mandatory** can be used to identify policies that employees must acknowledge or follow.
- **Signature Required** can be enabled when formal employee acknowledgement is required.
- The **Active** toggle on the policy list can be used to enable or disable an existing policy.
- **Show Policy On** determines the employee process or location where the policy is presented.
- Review all policy details and settings before selecting **Save**.