

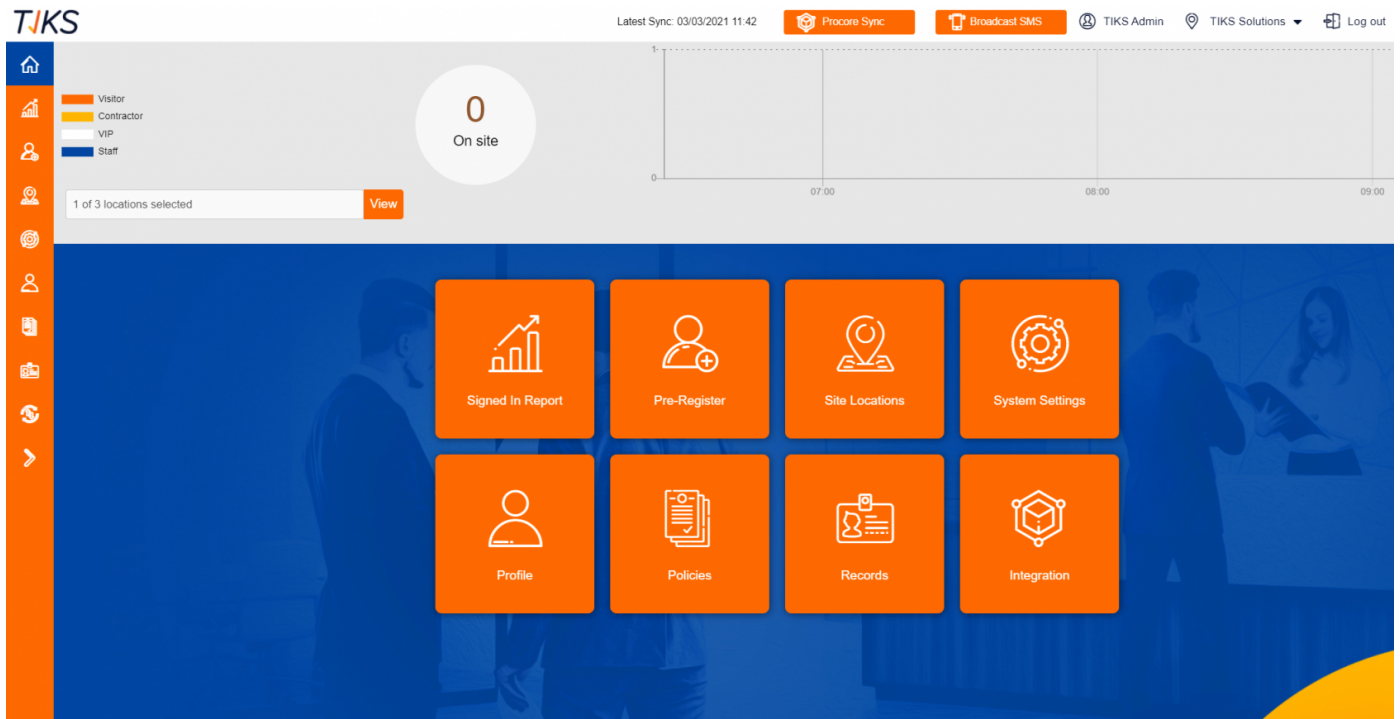
Policies

FAQs on how to manage the Policies feature

- [What is the Policies feature?](#)
- [How do I add a policy to the system for all users to view and acknowledge \(a global policy\)?](#)
- [How do I add a policy to view and acknowledge but only for a certain site not all sites \(a site specific policy\)?](#)
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- [How do I de-activate or re-activate a policy?](#)

What is the Policies feature?

If you select the “Policies” tile from the dashboard you can set up options to apply a policy (pdf document) for a user to read and acknowledge as part of their site attendance.



How do I add a policy to the system for all users to view and acknowledge (a global policy)?

Select the Policy tile in the admin dashboard.



Go to “Policies for all sites”. Type the title of the policy.

Select “Choose file” to add the policy file. Then select “Upload”.

The policy will then be shown below. Users will then see this policy as part of their site sign in to every site.

Induction Policy

☐ Enable Policy Expiry?

Policies for all sites

Title

Upload policies: pdf only

Choose file

No file chosen

Upload

dummy.pdf

Dummy Policy

Save

Go to details

Policies for TIKS Office

Title

Upload policies: pdf only

Choose file

No file chosen

Upload

How do I add a policy to view and acknowledge but only for a certain site not all sites (a site specific policy)?

Select the Policy tile in the admin dashboard.



Go to “Policies for [SiteName]”. Type the title of the policy.

Select “Choose file” to add the policy file. Then select “Upload”.

The policy will then be shown below. Users will then see this policy as part of their site sign in for this site.

Induction Policy

Enable Policy Expiry?

Policies for all sites

Title

Upload policies .pdf only

Choose file

No file chosen

Upload

Policies for TIKS Office

Title

Upload policies .pdf only

Choose file

No file chosen

Upload

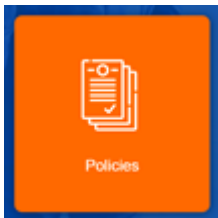
TEST Site Policy to acknowledge

Test Site Policy

Save

Can I have a policy that is shown for all site visits but also one for a particular site (a global policy and a site specific policy)?

Yes, select the Policy tile in the admin dashboard.



Go to “Policies for all sites”. Type the title of the policy.

Select “Choose file” to add the policy file. Then select “Upload”.

The policy will then be shown below. Users will then see this policy as part of their site sign in to every site.

Then

Go to “Policies for [SiteName]”. Type the title of the policy.

Select “Choose file” to add the policy file. Then select “Upload”.

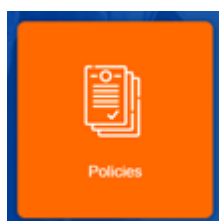
The policy will then be shown below. Users will then see this policy as part of their site sign in for this site.

The screenshot displays a web interface for managing policies. On the left is a vertical orange sidebar with various icons. The main content area has a light blue background with a faint silhouette of people. It contains two sections:

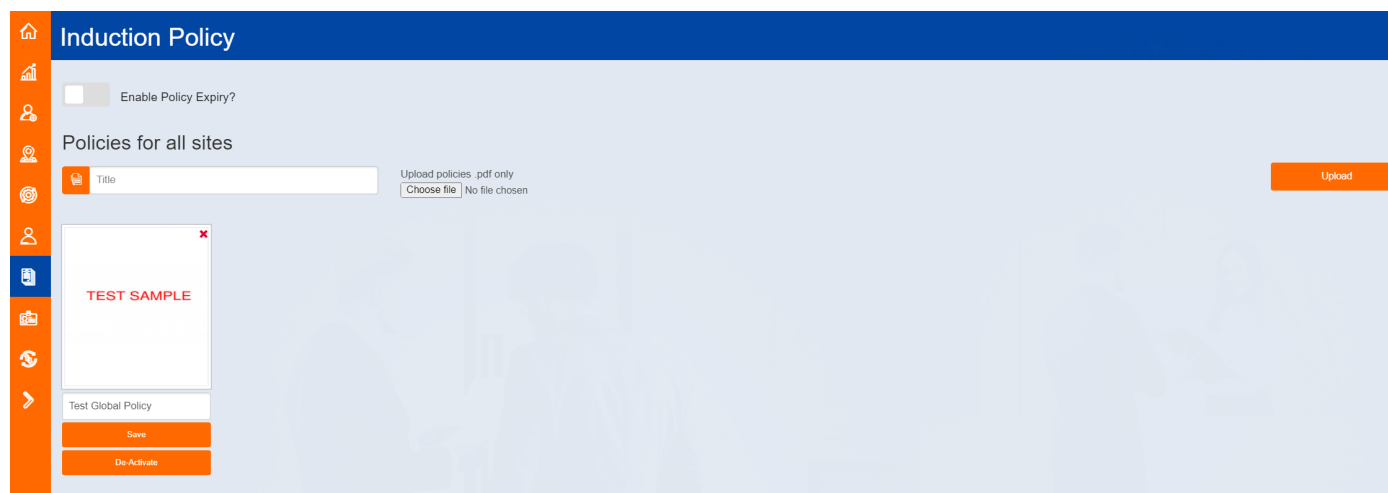
- Policies for all sites:** Includes a text input field for a title, a file upload button labeled "Choose file" (with a note "Upload policies .pdf only"), and an "Upload" button. Below this is a preview window titled "Generating the preview of the Policy" showing a "Test Global Policy" with "Save" and "Go Back" buttons.
- Policies for TIKS Office:** Includes a text input field for a title, a file upload button labeled "Choose file" (with a note "Upload policies .pdf only"), and an "Upload" button. Below this is a preview window titled "TEST Site Policy to acknowledge" showing a "Test Site Policy" with a "Save" button.

How do I de-activate or re-activate a policy?

Select the Policy tile in the admin dashboard.



You will see the below page.

A screenshot of the "Induction Policy" admin page. The page has a blue header with the title "Induction Policy". On the left is an orange sidebar with various icons. The main content area is light blue. At the top, there is a toggle switch for "Enable Policy Expiry?". Below this is a section titled "Policies for all sites". It contains a form with a "Title" input field, an "Upload policies pdf only" button, and a "Choose file" button. To the right of the form is an "Upload" button. Below the form is a preview window showing a "TEST SAMPLE" document. At the bottom of the preview window are "Save" and "De-Activate" buttons.

To turn off (de-activate) a policy but not delete it, select “De-Activate” on the policy. This will turn off the policy being shown to users but not delete it. It can be reactivated by clicking “Re-Activate”.

De-Activate

✕

TEST SAMPLE

Test Global Policy

Save

De-Activate

Re-Activate

✕

TEST SAMPLE

Test Global Policy

Save

Re-Activate