

Overview Video

<https://www.youtube.com/embed/sbioJnS6dFs>

Step-by-Step Tutorial Guide

Step 1: Open the Policy Module

1. Log in to the TankhaPay dashboard.
2. From the left-side navigation panel, locate **Policy**.
3. Click **Policy** to open the policy management page.
4. The page displays the list of all existing company policies.

This module helps organizations centrally manage employee policies and related documents.

Step 2: View Existing Policies

1. The Policy page displays all previously created policies.
2. Each policy record typically contains:
 - Policy Name
 - Category
 - Status
 - Effective Date
 - Created Date
3. Use the available search or filter options to locate a specific policy if required.

This allows HR administrators to quickly review and manage organizational policies.

Step 3: Create a New Policy

1. Click **Create Policy** or **Add Policy**.
2. The policy creation form opens.
3. Begin entering the required policy information.

This feature is used to publish new company policies for employees.

Step 4: Enter Policy Details

Complete the required information for the policy.

Configure details such as:

- Policy Name
- Policy Category
- Policy Description
- Effective Date
- Policy Version (if applicable)

Ensure all mandatory fields are completed before proceeding.

Step 5: Upload the Policy Document

1. Navigate to the document upload section.
2. Click **Upload** or **Choose File**.
3. Select the policy document from your computer.
4. Upload the document.

Supported documents generally include company policy files in approved formats.

Uploading the document ensures employees can access the complete policy whenever required.

Step 6: Configure Policy Applicability

After uploading the document, configure who the policy applies to.

You can define applicability based on:

- Organization
- Department
- Branch
- Employee Category
- Designation
- Other applicable employee groups (if configured)

This ensures the policy is shared only with the intended employees.

Step 7: Save and Publish the Policy

1. Review all entered information.
2. Verify the uploaded document.
3. Click **Save**, **Submit**, or **Publish**.
4. The policy is added to the policy list.

Once published, the policy becomes available according to its configured applicability.

Step 8: Manage Existing Policies

From the policy listing page, you can manage previously created policies.

Available actions may include:

- View policy details
- Edit policy information
- Replace or update policy documents
- Activate or deactivate policies
- Search and filter policies

This helps HR teams keep company policies updated and well organized.

Key Benefits of the Policy Module

- Centralized policy management
- Digital policy documentation
- Easy document upload and storage
- Department-wise or employee-wise policy assignment
- Faster policy communication
- Improved compliance and record management
- Easy updates to organizational policies

End of Tutorial

You have now completed the **Policy Management** walkthrough in TankhaPay.

This module enables organizations to create, publish, organize, and manage company policies from a centralized platform, ensuring employees have access to the latest policy documents while simplifying HR administration.

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