

How to Create an Area

To create a new Area, start by navigating to the Admin tab. Under the Site Data column, click Areas. From the top blue bar, click Create New Area.

Give the Area a name. Often these will reflect the departments at your facility.

Next, assign a default number of days that will serve as the expiration period for policies in this Area. Some sample time frames are provided for reference.

Each Area also needs to be assigned a default Approval Workflow. Click the dropdown and select the desired Workflow from the list. Best practice suggests having your workflow and Area names match.

With everything in place, click Create New Area and policies can now be assigned to this Area.