HR Suite Update Tutorial

How to Incorporate Model Policy Updates into your *Working Manual*

It is important to note that when updates are made to the *Master Manual*, these updates **do not automatically go into your *Working Manual***. We do not want to take the chance of overwriting your content, or putting in content that may not apply to your organization.

Using the "Overview" and the "Tracked Changes" information found in the online library, review the changes for each policy, and for each policy decide if you want to:

1. Do nothing and leave your *Working Manual* as is (usually if this policy has not been previously included in your *Working Manual* or if the update does not apply to your organization).

2. Remove the policy from your *Working Manual* and bring in the updated policy in its entirety (usually if the *Working Manual* version has little or no customization, or if the updates were very extensive and it would be easier to start with the updated content and re-customize for your organization)

3. Use the redlined version as a guide and manually incorporate the updates into the *Working Manual* version (usually if the updates were very minor, or if the working manual version is heavily customized and it would be less work to manually add the updates rather than re-customize the policy)

The following instructions demonstrate Option #2, which will remove the old policy from the Working Manual, and completely replace it with the updated model content from the Master Manual

HR Suite Tutorial

How to Incorporate Model Policy Updates into your *Working Manual*

There are three basic steps to bringing in the updated model policies in their entirety:

1. Archive (if necessary) the previous version of the policy

2. Remove (if necessary) the previous version of the policy from the *Working Manual*

3. Bring in the updated/new policy from the Master Manual to the *Working Manual*

All steps shown in this document occur in the MANUAL BUILDER area of HR Suite.

(Note: If you are bringing in a policy that was not previously in your *Working Manual*, only Step #3 is necessary)

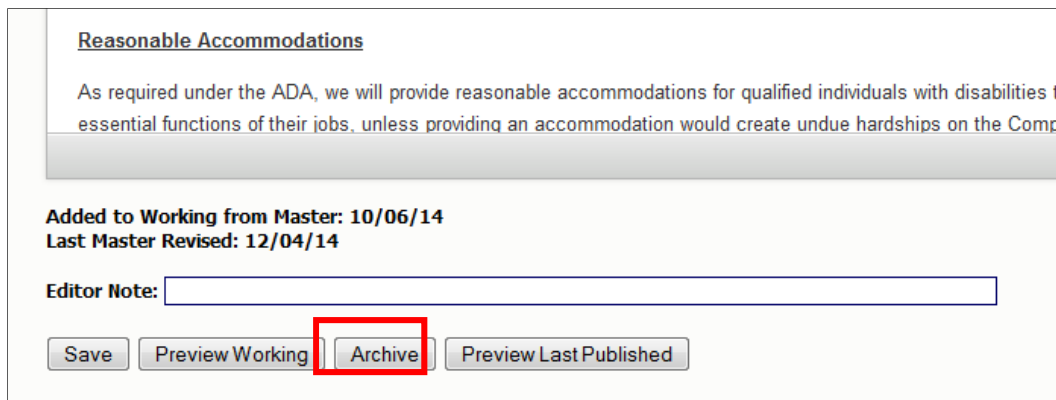# Step 1. Archive the Previous Version of the Policy

Archive Tip: Use the archive to save copies of policies that you have customized and are using in your organization, but are about to change. This will simply retain a copy of what the policy was before you made the change. If there is a model policy in your *Working Manual* that has not been customized and is not in use, the policy does not need to be archived.

If an un-customized model policy is not in use, it is recommended to remove it from your *Working Manual* as it can always be added back later from the Master Manual.

A policy can be archived one of two ways: At the individual policy level, which allows you archive a single policy, or using the Multi-Archive Utility, which allows you to archive multiple polices at once.

Archive a Single Policy at Individual Policy Level

1. Make sure you are in the *Working Manual*.

2. Using the plus signs to the left of each folder, expand the "Manual Administration" and the "Edit Sections of the Working Manual" folders.

3. Open the policy you wish to archive.

4. Click the Archive button below the policy content area and a 'point in time' copy of this policy will be added the *Archive* area.


5. Once in the *Archive*, the archived version of the policy can be viewed, printed or restored back to the Working Manual.

Archive Multiple Policies at One Time

1. Make sure you are in the *Working Manual*.

2. Using the plus signs to the left of each folder, expand the "Manual Administration" and the "Manual Section Management" folders.

3. Click on the "Multi-Archive Utility" link in the "Manual Section Management" folder.

4. On the right side of the screen, a full list of all policies in the *Working Manual* will appear, with a checkbox next to each policy.

5. Click the checkbox next to each policy that you want to archive.
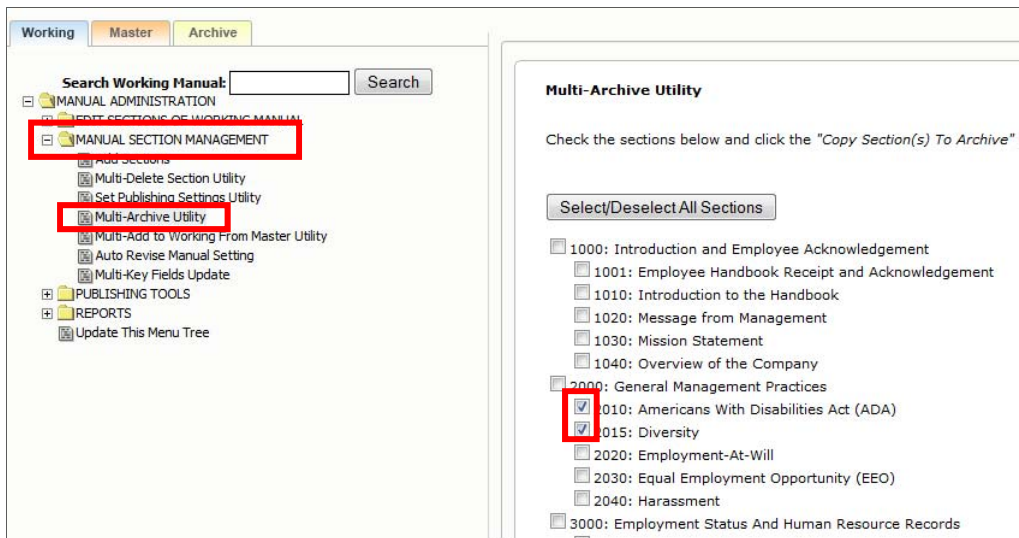
6. Scroll to the end of the page and click the "Copy Section(s) to Archive" button.
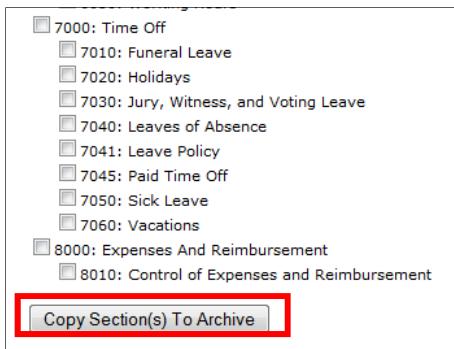
Step 2. Remove the Previous Version of the Policy from the *Working Manual*

1. Make sure you are in the *Working Manual*.

2. Using the plus signs to the left of each folder, expand the "Manual Administration" and the "Manual Section Management" folders.

3. Click on the "Multi-Delete Section Utility" link in the "Manual Section Management" folder.

4. On the right side of the screen, a full list of all policies in the *Working Manual* will appear, with a checkbox next to each policy.

5. Click the checkbox next to each policy that you want to remove.
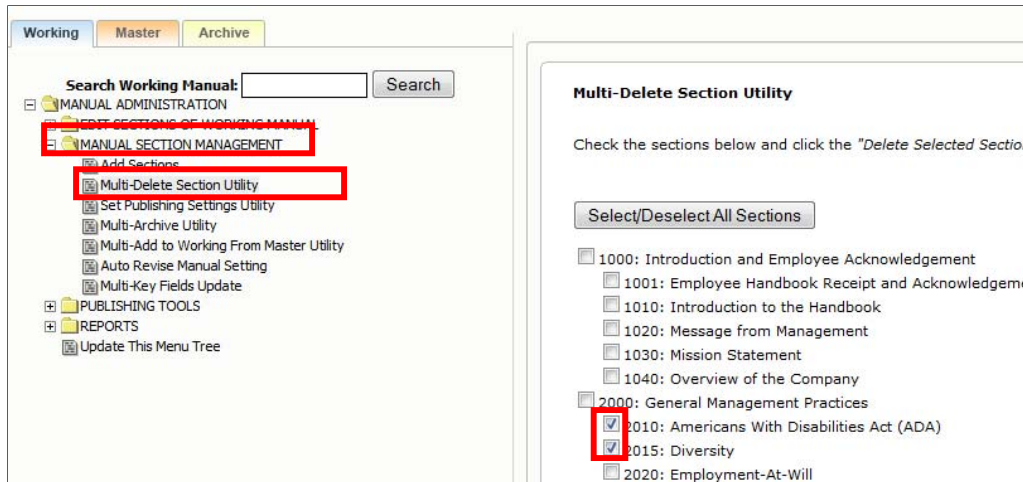
6. Scroll to the end of the page and click the "Delete Selected Sections from Manual" button.
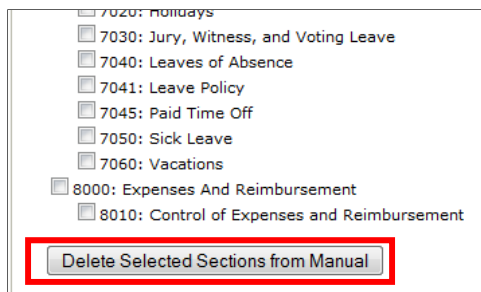
7. A confirmation box will pop up, and once confirmed, the selected policies will be removed from your *Working Manual*.

Policies that are removed by mistake can be restored by the HR Suite support staff. Contact policysupport@cusolutionsgroup.com for assistance.

Step 3. Bring in the Updated/New Policy
from the *Master Manual* to the *Working Manual*

Tip: Before adding policies from the *Master Manual* to the *Working Manual,* make sure any previous version of the policy has been removed from the *Working Manual*, as the newly inserted policy will not overwrite the previous policy. If you do not remove the previous version, you will end up with two different versions of the same policy, which can be confusing. Remember – out with the old, then in with the new.
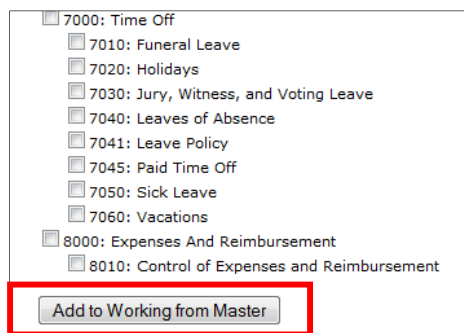
Adding model policies from the *Master Manual* to the *Working Manual* can be done one of two ways.

Option 1: Add multiple policies at one time. This option works best if you know exactly what policies you'd like to bring into your *Working Manual*, and do not need to review the content prior to bringing the content into your *Working Manual*.

1. Make sure you are in the *Working Manual*.

2. Using the plus signs to the left of each folder, expand the "Manual Administration" and the "Manual Section Management" folders.

3. Under the "Manual Section Management" folder, click the "Multi-Add to Working from Master Utility" link. On the right side of the screen, a form will appear listing all model policies available from the *Master Manual*, with a checkbox next to each policy.

4. Click the checkbox next to each model policy that you want to move from the *Master Manual* to your *Working Manual*.
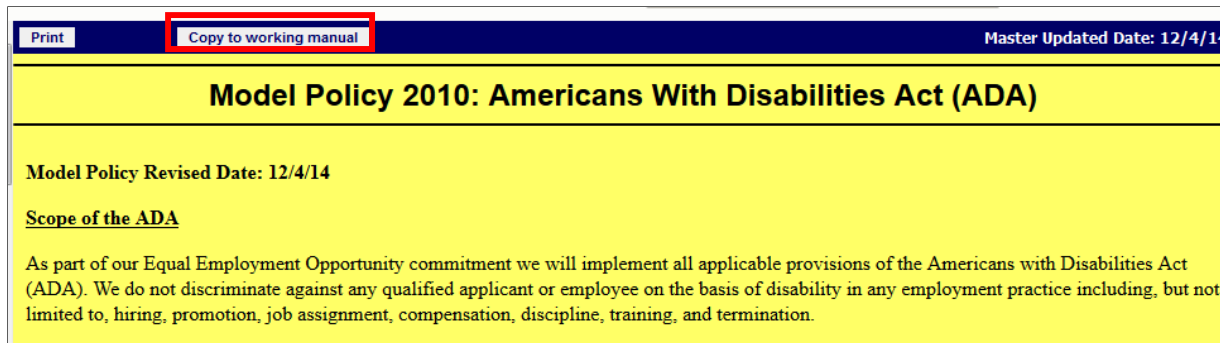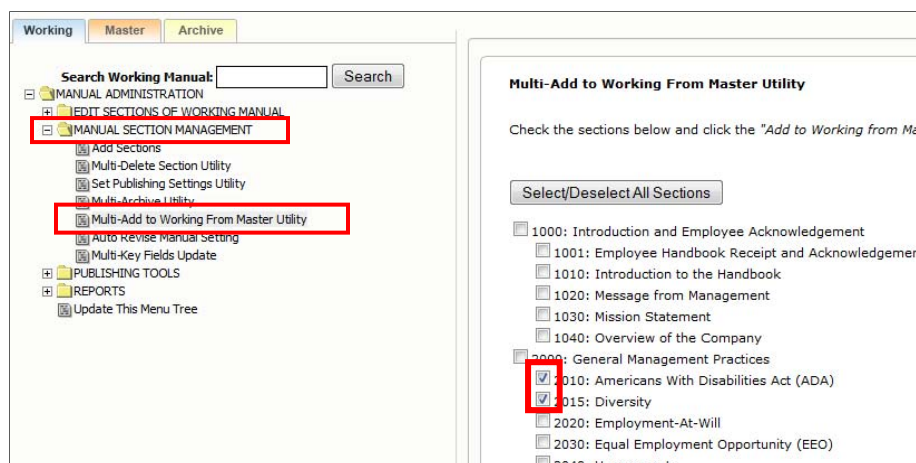

5. Scroll to the end of the page and click the "Add to Working from Master" button. The current model policy version from the *Master Manual* for each selected policy will be added to your *Working Manual*.

Option 2: Add one policy at a time. This option works best if you want to review the content of a model policy before bringing the policy from the *Master Manual* to the *Working Manual.*

1. Click on the "Master" link at the top left of the screen to make sure you are in the *Master Manual*.

2. Using the plus signs to the left of each folder, expand the "Manual Administration" and the "Master Manual" folders.

3. You will see a listing of all the available model polices.

4. Click on the model policy you would like to view, and the full text of the policy will appear on the right side of the screen.

5. Click the "Copy to Working Manual" button to move a copy of this model policy to the *Working Manual*.

If you have any questions on the steps for bringing in an updated policy in its entirety, or any other technical or content questions, please contact the HR Suite Support Staff at policysupport@cusolutionsgroup.com