



# USER'S GUIDE

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# Getting Started: General Information & Support

Before your Policy Manual (and Handbook) can be printed and distributed, important information should be customized. In its original form, the Manual is comprehensive and provides an excellent foundation for regulatory compliance. However, each organization is unique, and with this in mind, we have provided several tools to help you tailor the Manual to fit your operation.

We have developed a series of Key Fields to assist you in inserting company specific information into various policies. Editing, deleting, or adding to the text of the Manual is a broader and more flexible area of customization. You may easily modify the Manual to meet your needs, including customizing the model policy content, adding your own unique policies, and removing any model policy content that does not apply to your organization.

**We also suggest that you have your completed Manual and Handbook reviewed by legal counsel. While significant effort has been made to address federal compliance issues, laws and regulations change frequently. Additionally, individual state and local laws have not been addressed and are very diverse.**

## *References and Guides*

This User's Guide is a comprehensive resource with step by step instructions of HR Suite's features, tools, functionality, and best practices for getting the most from your online manual. However, it is intended to be used in conjunction with several other tools to ensure you have the information you need to correctly set up and customize your policies.

We strongly recommend printing and reading the following documents in addition to this User's Guide:

- **Quick Start Guide.** The Quick Start Guide provides very basic information on learning to navigate, understanding the terminology, and finding policies within your HR Suite manual.
- **Suggested Steps.** The *Suggested Steps* may be helpful to review before you begin the customizing process. It provides a very brief overview of the steps many clients take as they begin to work with their new manuals, and provides important guidance on policies before you begin customization, as well as providing information on the Key Fields Guide, State Law Customizing Guide and the HR Suite Policy Guide.
- **HR Suite Policy Guidance**

This document will provide guidance on a policy-by-policy basis to help you determine the level of customization that would be necessary for each policy.

Technical support is provided by the staff at CU Solutions Group. If you have questions or need assistance, please email [policysupport@cusolutionsgroup.com](mailto:policysupport@cusolutionsgroup.com) or call 800-262-6285 x310 or x527.

## Getting Started: Logging In

The main login screen for HR Suite can be accessed at <https://hrsuite.hrnonline.com/>.

Each user will need a User Name and Password to login.



Client Log-in

User Name:

Password:

[Forgot Password?](#)

Passwords are case sensitive so check your Caps lock key if you are unable to login.

Login

[hrsupport@cusolutionsgroup.com](mailto:hrsupport@cusolutionsgroup.com)  
Toll Free: 800-262-6285 x527

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If you have forgotten your password, you can use the "Forgot Password" link on the right side of the screen.

# Getting Started: The Home Page

The Home Page of HR Suite provides the user with information, navigation resources, and other resources as provided by the organization's administrator.

The **left side** of the screen will provide information on any updates to the system, new documentation updates, upcoming training information, and the release of the monthly newsletter. Information on training resources and who to contact for technical support is also located in this area.

The **center area** of the screen provides a welcome message to the user, and any resources that have been posted by an administrator. Access to resources is determined by the user's login. "Manager Resources" and "Manager Manuals" are available to users with full administrative rights, or to users who have been granted access to these resources. "Employee Resources" and "Employee Manuals" are available to all users.

The **top navigation** has the navigation menu to access the various areas of the site. This menu will remain at the top of the screen throughout all areas of HR Suite. **Note:** The screen shot below shows the top navigation bar for a user with full "admin" access. Users with any access level other than "admin" will see fewer options in the navigation bar. What is available depends on the level of access assigned.

The header bar has an icon in the left corner that will bring you back to this home page from any area of the site. In the right corner is an icon to logout of the system.

The screenshot shows the HR Suite Home Page for ABC CU. At the top, there is a navigation bar with the following links: Manual Builder, Library, Forms, Storage, Administration, Job Descriptions, and Home. The user is logged in as Mary Ann Koelzer with an admin access level. The page is divided into three main sections: Left, Center, and Top Navigation. The Left sidebar contains the date Wednesday, February 10, 2016, and information about training and content updates for January 2016. The Center area displays a welcome message and lists various resources such as Manager Manuals, Manager Resources, Employee Manuals, and Employee Resources. The Top Navigation bar is highlighted in red.

**TOP NAVIGATION**

HR Suite > Home  
**ABC CU**

Manual Builder | Library | Forms | Storage | Administration | Job Descriptions | Home

Logged in as: Mary Ann Koelzer  
Access Level: admin  
Change Password | Logout

Wednesday, February 10, 2016

**Training**  
Need help? [The HR Suite Support Site](#) contains video training, written instructions and documentation and Frequently Asked Questions.

[policy.support@cusolutionsgroup.com](mailto:policy.support@cusolutionsgroup.com)  
Call Support: 800-262-6285 x310 or x527

**Content Updates January 2016**  
The latest HR Suite Update is now available. This update includes a total of 54 policy updates (29 for the HR Policy Manual, and 25 for the Employee Handbook), three new policy additions (One to the Employee Handbook and two to the HR Policy Manual), the addition of one new form, and three form updates. Keep in mind the updates do NOT automatically go into your manual.

Hi! If you have questions call Sue.

**Manager Manuals**

- [HR Policies for the Board to Approve](#) (Date Published: 01/28/2016)
- [HR Policy Manual for My Managers](#) (Date Published: 01/28/2016)
- [HR Policy Manual](#) (Date Published: 10/29/2015)
- [Time Off Policies](#) (Date Published: 06/05/2014)

**Manager Resources**

- [Policy Updates July 2015 acknowledgement.docx](#)

**Employee Manuals**

- [changes for July 2015](#) (Date Published: 07/15/2015)
- [Time Off Policies](#) (Date Published: 07/15/2015)

**Employee Resources**

- [New Employee Signature Form.docx](#)

**LEFT**

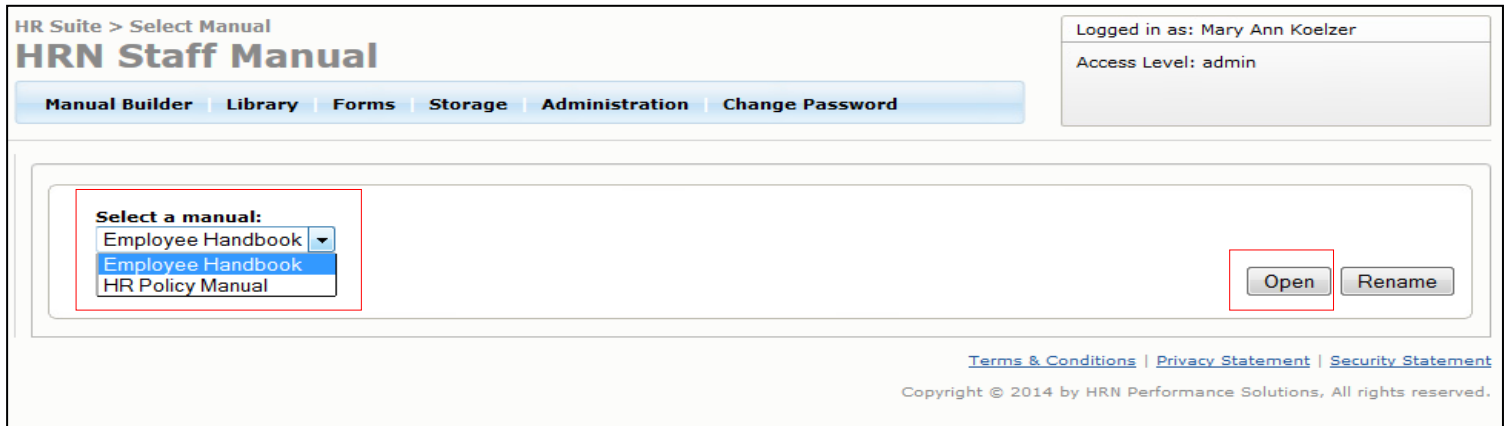
**CENTER**

# Working with Policies: Accessing Manual Builder

All policies are housed in the Manual Builder area of HR Suite. Manual Builder can be opened by clicking on the “Manual Builder” tab on the top navigation menu when you first login.

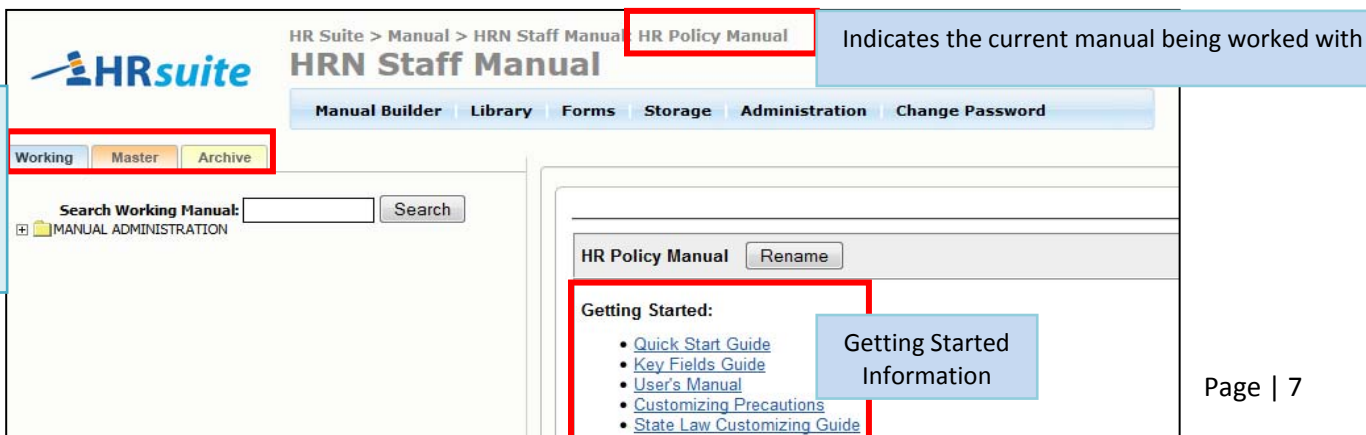


Existing manuals will appear in the “Select a Manual” dropdown box. Click the dropdown arrow and select a manual. Click “Open”.



Near the top left of the screen, there are tabs to access the Working Manual, Master Manual and Archive. When you open the Manual Builder area, by default you will be in the Working Manual. To move between the Working, Master or Archive, click the corresponding tab. The breadcrumb at the top of the screen will indicate if you are in the HR Policy Manual or the Employee Handbook.

When you first enter the Manual Builder area, some resources for Getting Started are available on the right side of the screen. As you move through the navigation found in the Working Manual, Master Manual and Archive, the information on the right side will change.



## Important Definitions & Information

- The **Working Manual** is used to maintain and customize the policies for your organization. The Working Manual contains the top level chapter folders, but does not contain any policies unless they have been added. Model policies can be added to the Working Manual from the Master Manual, or unique policies may be added.
  - Within this document, “**Custom Policies**” refers to those policies in the Working Manual because they can (and should) be customized for your organization. The actual content in the Working Manual may be model policy content if you have not yet customized it.
- The **Master Manual** contains all available model policies. Any model policy can be moved from the Master to the Working Manual.
  - Within this document, “**Model Policies**” refers to those policies in the Master Manual.
- The **Archive** allows you to archive policies from the Working Manual.

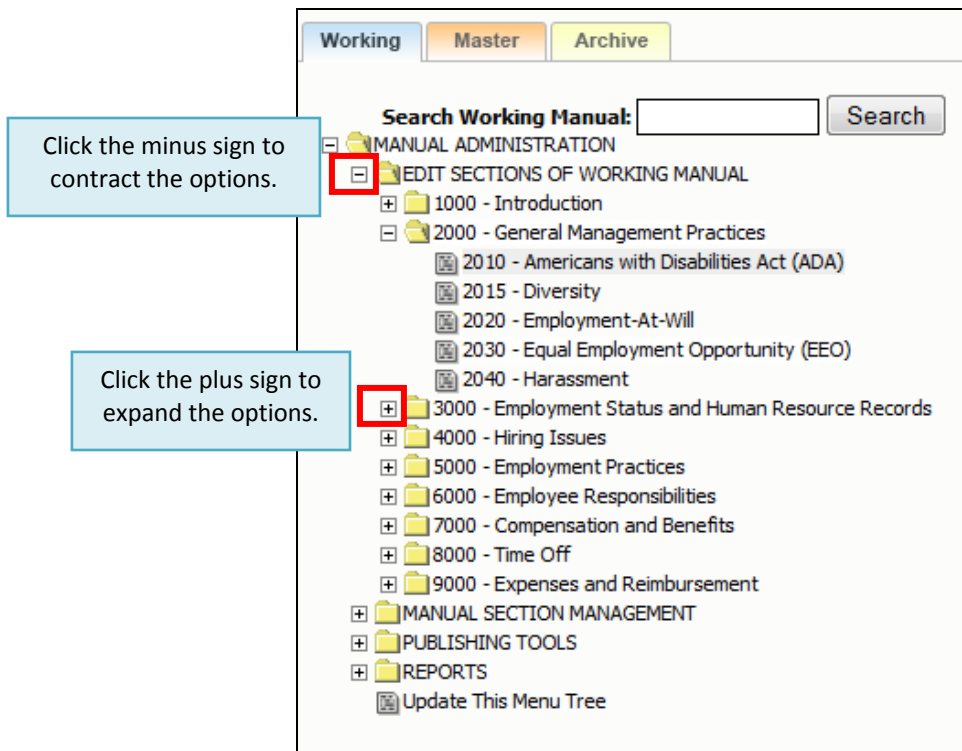


## Working with Policies: Navigating Manual Builder

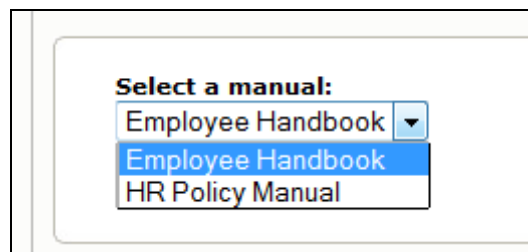
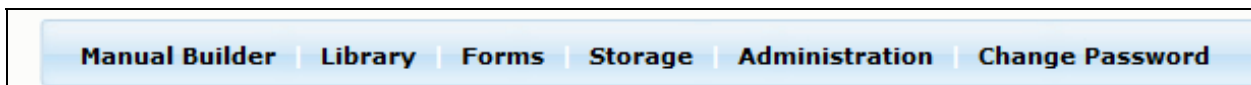
Whether you are in the Working Manual, Master Manual or Archive, the navigation will be along the left side of the screen, starting with a folder titled “MANUAL ADMINISTRATION”. Additional folders of navigation are contained within the “MANUAL ADMINISTRATION” folder.

A plus sign to the left of any folder indicates that there are more options beneath it. Click the plus sign to expand the folder and view the available options.

A minus sign indicates the folder is expanded. Clicking the minus sign will contract the folder.

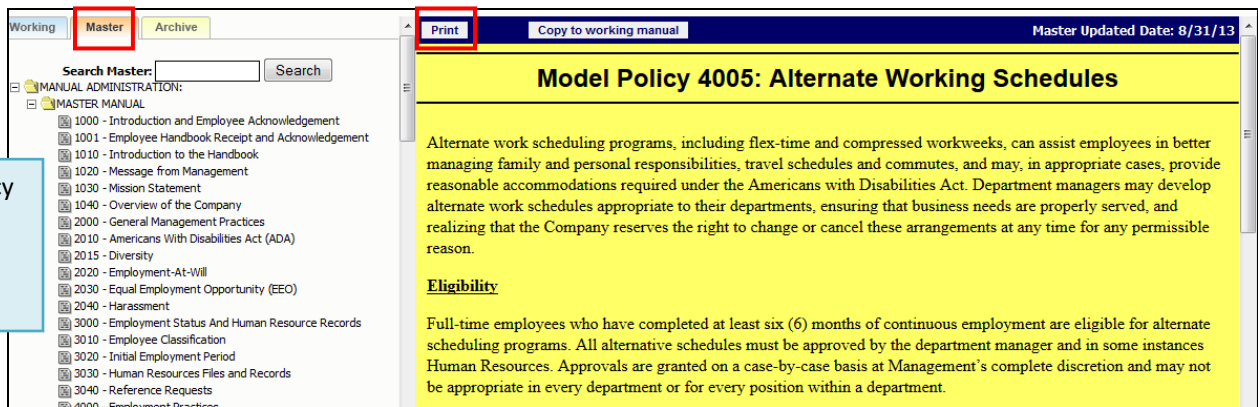


To switch between the Employee Handbook and the HR Manual, click the “Manual Builder” link on the top navigation, then select a manual from the dropdown list.



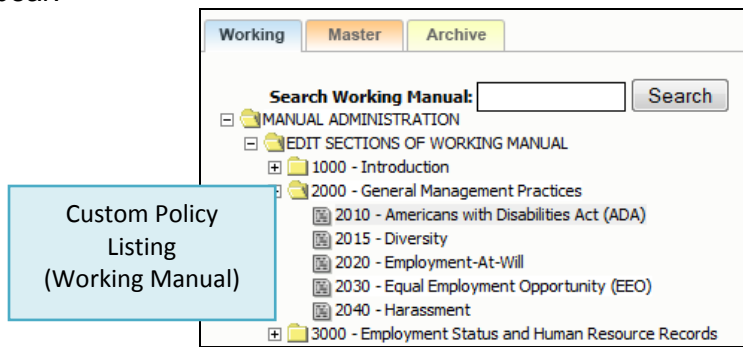
# Working with Policies: Viewing & Printing Model Policies

1. Click on the “Master” tab at the top left of the screen to make sure you are in the Master Manual.
2. Click the plus sign next to the “MANUAL ADMINISTRATION” folder and the “MASTER MANUAL” folders to expand both folders.
3. You will see a listing of all the available model polices. Model Policies are indicated by a yellow background and cannot be edited. The content must be moved to the Working Manual in order to be edited.
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. To Print a model policy, click the “Print” button at the top of the model content.

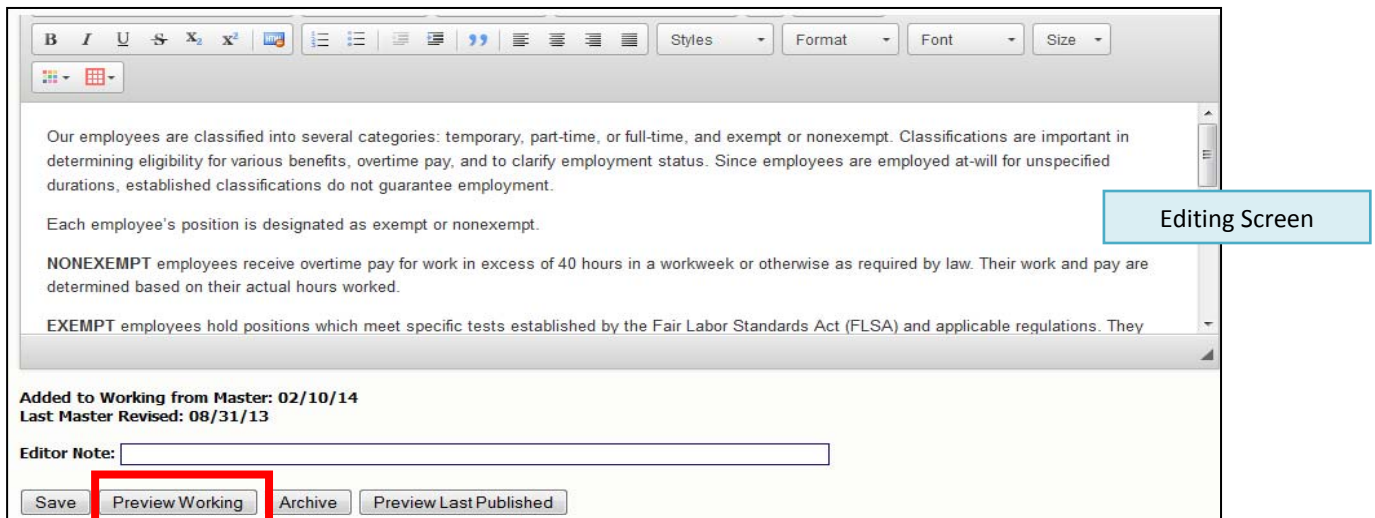


## Working with Policies: Viewing & Printing Custom Policies

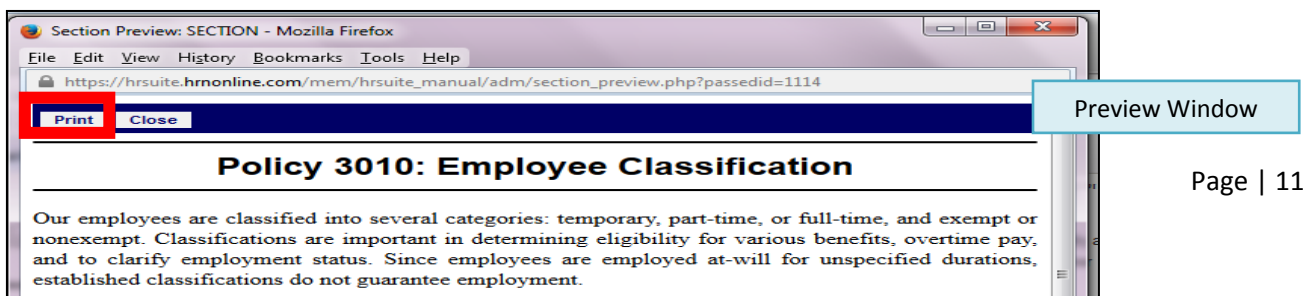
1. Click on the “Working” tab at the top left of the screen to make sure you are in the Working Manual.
2. Using the plus signs to the left of each folder, expand the “MANUAL ADMINISTRATION” and the “EDIT SECTIONS OF WORKING MANUAL” folders. The top level chapter topics will display. Each chapter page is divisible by 1000. Chapter pages include a piece of code that will generate table of contents for what is included in the chapter, but do not include policy content.
3. Click the plus sign next to the chapter you wish to open. A listing of policies within that chapter will appear.



4. Click on the name of the policy you would like to view, and the full text of the policy will appear on the right side of the screen (editing screen). You can read through the policy on the editing screen.
5. Click the “Preview Working” Button directly below the content editor on the editing screen. A new window (preview window) will open. Many people find it easier to read the full policy in the preview window rather than in the editing screen. **Note:** If your policy has not yet been published, you will not see the “Preview Last Published” button as shown in the screen shot below.



6. At the top of the preview window is a “Print” button that can be clicked to print this single policy.



# Working with Policies: Adding Policies to the Working Manual

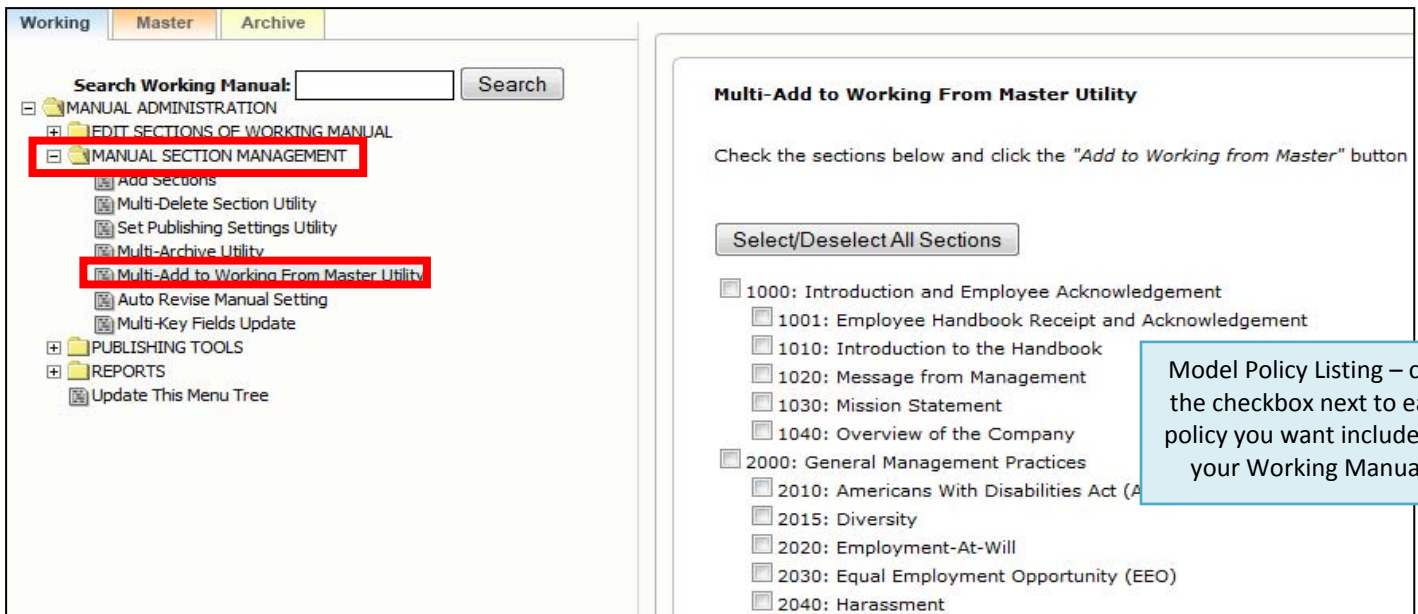
Model policies from the Master Manual, or your own unique policies, can be added to your Working Manual.

## *Adding Model Policies from the Master Manual to the Working Manual*

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. Click on the "Working" tab at the top left of the screen to 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.



The screenshot displays the 'Working Manual' interface. At the top, there are tabs for 'Working', 'Master', and 'Archive'. Below the tabs is a search bar labeled 'Search Working Manual' with a 'Search' button. The left sidebar shows a tree view of the manual's structure. The 'MANUAL SECTION MANAGEMENT' folder is expanded, and the 'Multi-Add to Working From Master Utility' link is highlighted with a red box. The main content area is titled 'Multi-Add to Working From Master Utility' and contains a list of model policies with checkboxes next to them. A blue callout box points to the list with the text: 'Model Policy Listing – click the checkbox next to each policy you want included in your Working Manual.'

**Multi-Add to Working From Master Utility**

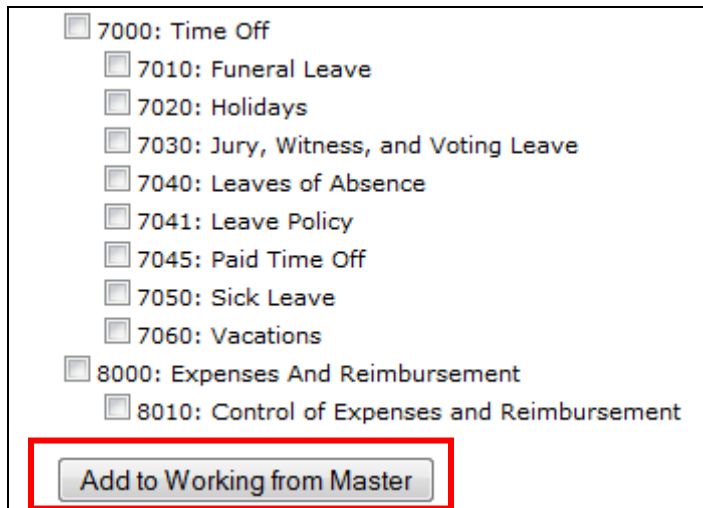
Check the sections below and click the "Add to Working from Master" button

Select/Deselect All Sections

- 1000: Introduction and Employee Acknowledgement
  - 1001: Employee Handbook Receipt and Acknowledgement
  - 1010: Introduction to the Handbook
  - 1020: Message from Management
  - 1030: Mission Statement
  - 1040: Overview of the Company
- 2000: General Management Practices
  - 2010: Americans With Disabilities Act (A
  - 2015: Diversity
  - 2020: Employment-At-Will
  - 2030: Equal Employment Opportunity (EEO)
  - 2040: Harassment

## ***Adding Model Policies from the Master Manual to the Working Manual (continued)***

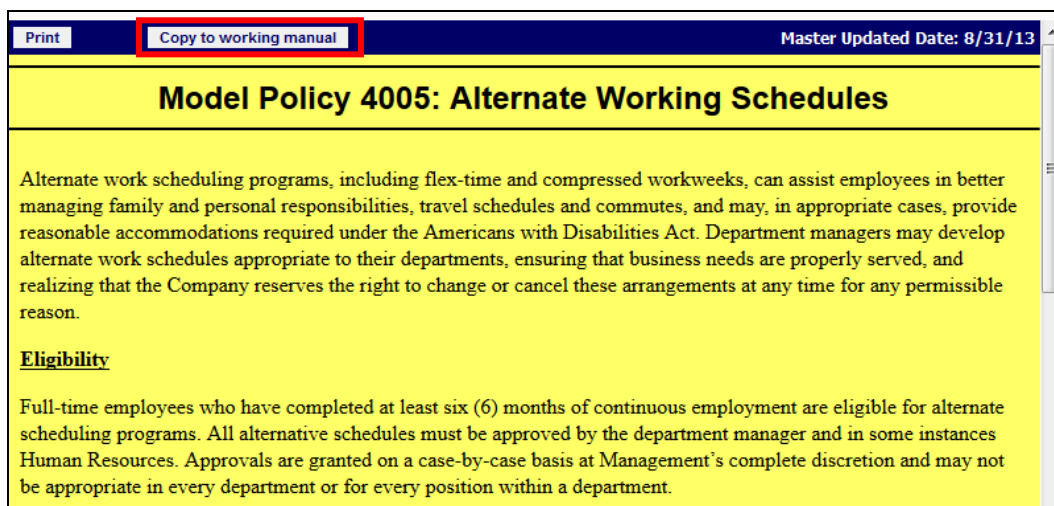
5. Scroll to the end of the page and click the “Add to Working from Master” button. The current model policy version from the Master Manual for each selected policy will be added to your Working Manual.



A screenshot of a web interface showing a list of model policies. Each policy is preceded by a small square checkbox. The policies listed are: 7000: Time Off, 7010: Funeral Leave, 7020: Holidays, 7030: Jury, Witness, and Voting Leave, 7040: Leaves of Absence, 7041: Leave Policy, 7045: Paid Time Off, 7050: Sick Leave, 7060: Vacations, 8000: Expenses And Reimbursement, and 8010: Control of Expenses and Reimbursement. At the bottom of the list, there is a button labeled "Add to Working from Master" which is highlighted with a red rectangular border.

**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” tab 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 policies.
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.



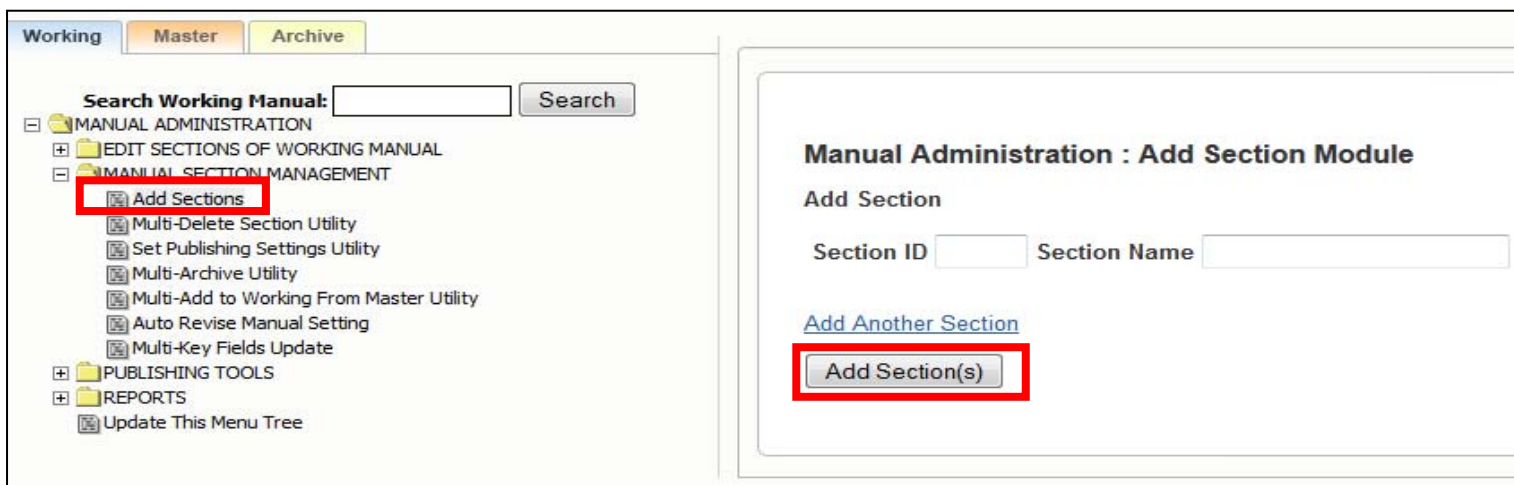
A screenshot of a web page displaying a model policy. At the top, there is a dark blue header bar with three buttons: "Print", "Copy to working manual" (highlighted with a red box), and "Master Updated Date: 8/31/13". Below the header, the main content area has a yellow background. The title "Model Policy 4005: Alternate Working Schedules" is centered at the top of this area. The text below describes alternate work scheduling programs and their benefits. A section titled "Eligibility" is underlined and followed by text detailing the requirements for employees to be eligible for these programs.

## ***Adding Unique Policies to the Working Manual***

1. Click on the “Working” tab at the top left of the screen to 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 the “Add Sections” link.
4. On the right side of the screen, a form will appear to allow you to add a unique policy. Type the policy number in the “Section ID” field and the policy name in the “Section Name” field.

**Tip: The policy number chosen must be greater than 1000 and fall into an existing chapter folder. Policy numbers below 1000 or those that have no associated Chapter folder will not be accessible for editing in the Working Manual.**

5. To add more than one policy at one time, click the “[Add Another Section](#)” link.
6. Click the “Add Section(s)” button. This creates a blank policy in your Working Manual. The new policy will appear in the Working Manual in numeric order.



7. To add a new chapter, type the Chapter number in the “Section ID” field and Chapter name in the “Section Name” field. Chapters must be divisible by 1000 (i.e. 9000, 10000, etc.). Policies will not be available for editing in the Working Manual if they do not have an associated Chapter.

**Tip: If you accidentally give your new policy the same number as an existing policy, don't worry! You won't overwrite the existing content. You will simply have two policies with the same number. However, this is not recommended, so if you notice that you have duplicated a policy number, we recommend changing the number on the new policy you created.**

## Editing Policies: General Information

When you open a specific policy, the full text of the policy is available on the right side of the screen. It opens within a content editor, allowing full customization of the text.

A **toolbar** at the top of the content includes the policy name, policy number, icons for formatting the font, date fields, and publishing settings.

The **content area** is the body of the text, which is fully editable. Specific formatting, such as numbered lists, graphics, and tables can be added to the text within the content area.

Below the content area are editor notes, date information specific to the policy, and action buttons to save, preview, or archive the content. **Note:** If your policy has not yet been published, the “Preview Last Published” action button will not be available.

Each of these areas and their functionality will be described in more detail in subsequent sections of the User’s Guide.

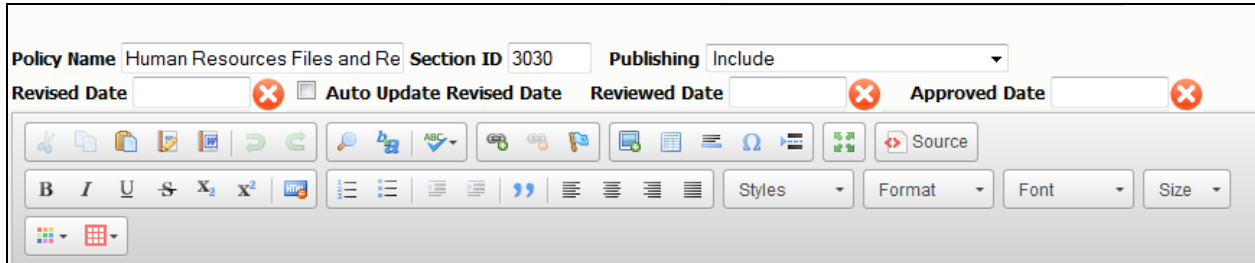
The screenshot displays a content editor interface. At the top, there is a header section with the following fields: **Policy Name** (Human Resources Files and Re), **Section ID** (3030), **Publishing** (Include), **Revised Date** (with a red 'X' icon), **Auto Update Revised Date** (checkbox), **Reviewed Date** (with a red 'X' icon), and **Approved Date** (with a red 'X' icon). Below this is a **Toolbar** containing various icons for text formatting (bold, italic, underline, strikethrough, subscript, superscript, link, unlink, list, indent, outdent, quote, unquote, style, format, font, size) and a **Source** button. The main **Content Area** contains the following text: Updating Information  
Records and information regarding our applicants, employees, and former employees are kept to ensure compliance with government requirements and to support our business, benefit programs and employment actions. We are committed to protecting this personal information and have established procedures to safeguard it. All employees are required to assist in keeping this personal information confidential, safe, and current.  
Employees Should Notify Us of Changes  
Employees are asked to notify Human Resources of any changes in their personal information including:

Below the content area is the **Date Information** section, which displays: **Added to Working from Master: 02/10/14**  
**Last Master Revised: 01/01/11**



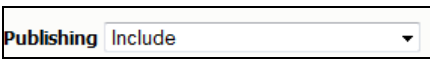
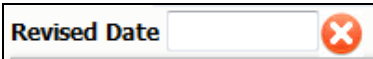


Below the date information is the **Editor Notes** section, which includes a text input field for the editor note and a **Editor Notes** label. At the bottom of the interface are four action buttons: **Save**, **Preview Working**, **Archive**, and **Preview Last Published**.

## Editing Policies: The Toolbar

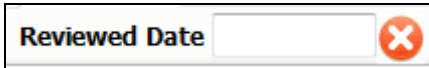
When adding or editing content, you will be in an editing environment that is similar to MS Word. The Toolbar has many of the same tools that are used in Word.




The following section outlines the functions of each item in the Toolbar. Hovering your mouse over each toolbar icon will bring up a label with information about the tool.

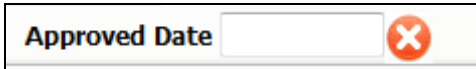
Icon	Function
	<p><b>Policy Name.</b> The title of the Policy. This can be updated at any time.</p>
	<p><b>Section ID.</b> This numbers the policy and determines the order in which the policy appears within the Chapter. While the system does not prevent you from changing the Section ID if you want to reorder the policies within a chapter (or even move a policy between Chapters), this is not recommended as many of the model policies refer to each other by the original ID assigned.</p>
	<p><b>Publishing Setting.</b> This allows you to determine if a policy will be included or not included in the published manual. You can also include a previously published version if your policy is currently being edited. For more information on publishing, see pages 34.</p>
	<p><b>Revised Date.</b> Click in this field to open a calendar that allows you to select the Revised Date for the policy. The Revised Date will appear below the title of the policy in the published manual.</p> <p>Click  to remove the Revised Date.</p>
	<p><b>Auto Update Revised Date.</b> Checking this box will automatically place the current date in the “Revised Date” field each time the policy is saved. See page 33 for information on how to automatically check or uncheck this box on all policies in your manual.</p>



**Icon****Function**

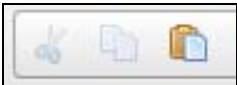
**Reviewed Date.** Click in this field to open a calendar that allows you to select the Reviewed Date for the policy. The Reviewed Date will appear below the title of the policy in the published manual.

Click  to remove the Reviewed Date.



**Approved Date.** Click in this field to open a calendar that allows you to select the Approved Date for the policy. The Approved Date will appear below the title of the policy in the published manual.

Click  to remove the Approved Date.



**Cut, Copy and Paste.** These are common editing icons to Cut, Copy, and Paste text. It is recommended when pasting to choose one of the other Paste options noted below.



**Paste As Text.** This icon will paste text into the content as Plain Text with all formatting removed from the pasted text. This paste method often is used when pasting from Word to HR Suite.



**Paste from Word.** This icon will paste text into the editor while stripping certain formatting code used in MS Word which can interfere with formatting in the HR Suite editor. This is recommended when pasting from Word. See page 20 for more information on this tool.



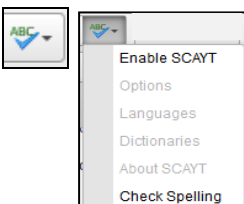
**Undo and Redo.** These are standard icons which allow users to “undo” or “redo” multiple steps.










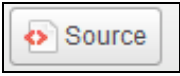
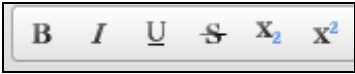

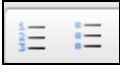
**Find.** This allows you to search the current policy for specific text.





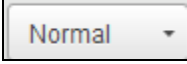





**Replace.** This allows you to search the current policy for specific text and replace it with new text.



**Spell Check.** Use the dropdown and click “Enable SCAYT” to turn on the spell check. Spell check is disabled by default because running spell check on some of the longer policies can cause the system to run slowly. Spell check will show a red squiggly underline in the content area for any words the system does not recognize. Right click on the underlined word for spelling suggestions.

Icon	Function
	<p><b>Add Link, Remove Link and Anchor.</b> These icons are generally used for editing web content, and are not typically used when editing policies in HR Suite.</p>
	<p><b>Insert/Edit Graphics.</b> This icon inserts a graphic image into the content. Images are not typically inserted into HR Suite policies.</p>
	<p><b>Insert/Edit Table.</b> Inserts a table into a policy or allows editing of an existing table. See page 25 for more information on Tables.</p>
	<p><b>Horizontal Line.</b> Places a horizontal line across the screen.</p>
	<p><b>Special Character.</b> Allows the placement of special characters within the text.</p>
	<p><b>Page Break.</b> Allows the user to manually insert a page break when this page is printed (single policy print or published manual print).</p>
	<p><b>Maximize Editor.</b> Increases the editor size – some toolbar icons and tools below the editor are hidden when this icon is used. Click on the icon again to restore these hidden tools.</p>
	<p><b>Source.</b> Allows a user to view the HTML code behind the page, and modify it directly, if desired. It is not recommended to edit the HTML code unless you have prior HTML experience.</p>
	<p><b>Bold, Italic, Underline, Strikethrough, Subscript and Superscript.</b> Common editing items to format text.</p>
	<p><b>Remove Formatting.</b> Removes all formatting from any highlighted text</p>
	<p><b>Numbering and Bullets.</b> Standard icons used to apply numbering and bullet formats. See page 21 for more information on applying these styles.</p>

Icon	Function
	<p><b>Increase and Decrease Indentation.</b> Allows blocks of text to be indented to the right (or moved back to the left). Often used in conjunction with bullets and numbering formatting.</p>
	<p><b>Block Quote.</b> Creates indentation to the left and right of a block of text. Often used to offset text within a document.</p>
	<p><b>Left, Right Center and Block Justify.</b> Standard formatting tools used to align paragraphs of text.</p>
	<p><b>Formatting Styles.</b> This icon applies pre-set styles to blocks of text. This will apply the selected style to the entire paragraph. You cannot select a specific bit of text when applying Formatting Styles. To remove Formatting Styles, use the “Remove Formatting” icon. This tool is similar to the “Paragraph Styles” tool.</p>
	<p><b>Paragraph Styles.</b> This icon applies pre-set styles to blocks of text. This will apply the selected style to the entire paragraph. You cannot select a specific bit of text when applying Formatting Styles. To remove Formatting Styles, use the “Remove Formatting” icon. This tool is similar to the “Formatting Styles” tool.</p>
	<p><b>Font Style and Font Size.</b> Standard formatting tool to allow changes to font style and font size. Most users choose to use the default font style and size in HR Suite.</p>
	<p><b>Text Color.</b> Allows color changes to highlighted text. Click the dropdown arrow to see the color choices.</p>
	<p><b>Background Highlighting.</b> Highlights behind text. Click the dropdown arrow to see the color choices.</p>

## Editing Policies: Adding and Editing Text

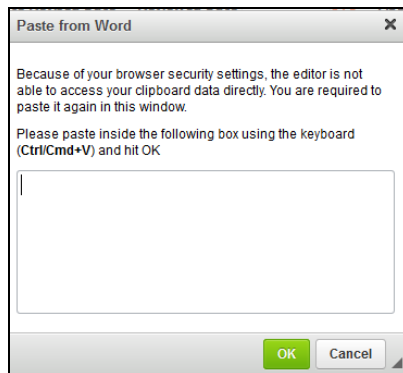
To edit existing text, simply place your cursor within the text and begin typing, deleting, or using the formatting tools in the Toolbar.

Text can also be copied/pasted from other sources, such as MS Word or Excel. When pasting from another source, it is **recommended to use either the “Paste from Word” icon or the “Paste as Plain Text” icon**. See below for more information on using these icons.

## Editing Policies: Paste from Word



1. Highlight and copy the text in the Word document.
2. Place your cursor where you want the text to be pasted, then click the “Paste from Word” icon (see screen shot above). **Note:** the icons do look similar, so if you’re not sure, hover the mouse over the icon and the words “Paste from Word” will appear over the proper icon.
3. A pop up dialog box opens to allow you to paste your copied content into the box.



4. Pasting from Word will retain much of the font formatting from Word; however, some formatting will not carry over and may need to be reformatted. All content will paste in; and bold, italic, and underline formatting typically paste in with no issues.

The following items are the most common formatting items that may need to be reformatted after pasting in from Word:

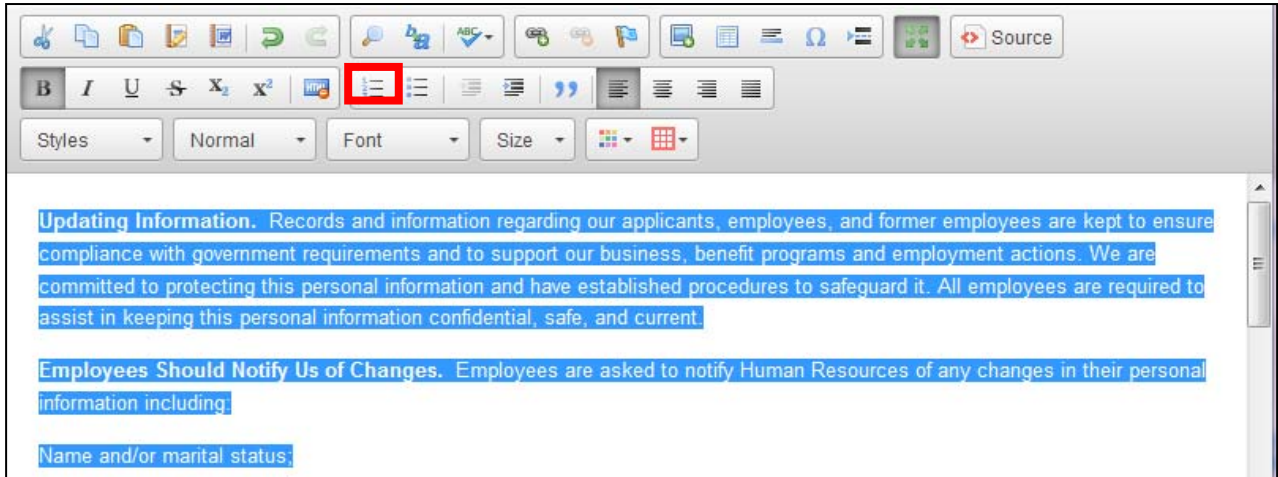
- **Bullets and numbering.** The system may bring in the bullets/numbering as text. The bullet or numbering style will need to be reapplied, and the added text bullets or numbers will need to be removed.
- **Columns.** If columns were set up in Word, the column structure may not be retained. Tables may need to be added to recreate the columns. See page 25 for more on how to build a table.
- **Spacing.** Extra space between paragraphs is common, and extra spaces often need to be removed.

# Editing Policies: Creating and Formatting Numbered & Bulleted Lists

Many of the policies in the HR Suite Manual use numbered lists or bullets, especially in the HR Policy Manual. **Note:** This section of the User's Guide outlines how to apply and format numbered lists. The exact same method is used for applying and formatting bulleted lists. The only difference is the icon used to choose if numbered list or bullet style should be used. All screen shots show numbered list formatting. There are no separate text explanations or screen shots for bulleted lists.

## *Applying Numbered Lists to Paragraph Text*

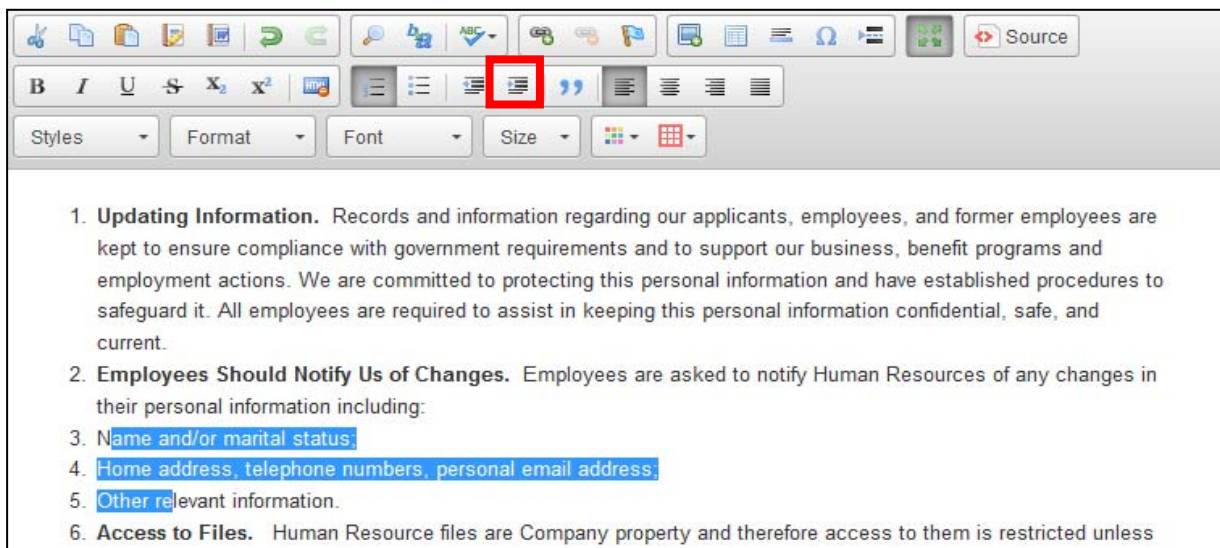
1. To use the numbering function, highlight the text to be put into a list and click the numbering icon.



## *Creating a Sublist in an Existing Numbered List*

1. Numbered list formatting must already be applied to the content in order to create a sublist.
2. To create a sub-list, highlight the text that should be indented, and use the "Increase Indent" icon, which has an arrow pointing to the right. **Note:** Using "Decrease Indentation" will take the numbered list formatting off of your highlighted text.

**Tip: When highlighting, only a portion of the text in the last line needs to be highlighted. If the entire last line of text is highlighted and the block indentation is not working, try highlighting only a portion of the last sentence.**



## Creating a Sublist in an Existing Numbered List (continued)

- By default, the sublist will have the same numbering style as its parent list.

The sublist has the same formatting as the parent list style.

1. **Updating Information.** Records and information regarding our applicants, employees, and former employees are kept to ensure compliance with government requirements and to support our business, benefit programs and employment actions. We are committed to protecting this personal information and have established procedures to safeguard it. All employees are required to assist in keeping this personal information confidential, safe, and current.

2. **Employees Should Notify Us of Changes.** Employees are asked to notify Human Resources of any changes in their personal information including:

1. Name and/or marital status;
2. Home address, telephone numbers, personal email address;
3. Other relevant information.

3. **Access to Files.** Human Resource files are Company property and therefore access to them is restricted unless applicable law requires otherwise. Generally, only management personnel have access to the files. Except as otherwise required by law, employees may review their own records by making a written request for an appointment

- To change the style of the sublist, highlight any part of the sublist, **right click** on the highlighted text, and choose “Numbered List Properties”.

2. **Employees Should Notify Us of Changes.** Employees are asked to notify Human Resources of any changes in their personal information including:

1. Name and/or marital status;
2. Home address, telephone numbers, personal email address;
3. Other relevant information.

3. **Access to Files.** Human Resource files are Company property and therefore access to them is restricted unless applicable law requires otherwise. Generally, only management personnel have access to the files. Except as otherwise required by law, employees may review their own records by making a written request for an appointment

- A dialog box will pop up with several different numbering styles to choose from (in a dropdown list).
- Choose the style you prefer from the dropdown list. Click “OK” to apply the selected style to the sublist. You can also use this dialog box to start the numbering or sub-numbering at a particular number.

**Numbered List Properties**

Start: 1

Type: <not set>

- <not set>
- Lower Roman (i, ii, iii, iv, v, etc.)
- Upper Roman (I, II, III, IV, V, etc.)
- Lower Alpha (a, b, c, d, e, etc.)
- Upper Alpha (A, B, C, D, E, etc.)
- Decimal (1, 2, 3, etc.)

## ***Double Spacing Items in a Numbered List***

The model policies are double spaced to make reading the policies a bit easier. However, by default, the HR Suite system will single space each item in a numbered list.


The following steps are the best practice method for creating double spaced lines in a numbered list. It is recommended to take care of spacing last, after all content is in the numbered list, with each item in the correct position and correctly formatted.

1. Place your cursor **at the end** of the first item that is single spaced.
2. Hold the SHIFT key as you press ENTER (SHIFT+ENTER). This will drop the cursor down one line without creating a new item in the numbered list, effectively creating a double space.
3. Use the space bar to add a “space” in the newly created line break. Some printers will not recognize the SHIFT+ENTER code and will remove the double spacing during printing. The “space” character acts as a place holder, making the spacing appear as expected.

## ***Adding New Items to an Existing Numbered List***

This section describes the best practice method for adding new content to an existing numbered list. More detailed information on formatting and spacing is available in the sections immediately preceding this one.

While many methods can be used to create a numbered list, following the order of operations below to add a new item to an existing numbered list will provide the best result.

1. Place your cursor **at the end** of the previous item within the existing numbered list.
2. Press ENTER, which will create a new item in the numbered list. It may not yet be in the correct position or may not have the correct numbering style or spacing – this is OK.
3. Type (or paste) the text for the new item. If pasting, it is recommend to **paste as plain text**.
4. If necessary, position the new numbered list item using the “Increase Indentation” or “Decrease Indentation” icons. 
  - a. If the item should be in a sublist position (needs to indent to the right), use the “Increase Indentation” icon with the right arrow.
  - b. If the item should be in a parent position (needs to outdent to the left), use the “Decrease Indentation” icon with the left arrow. The left “Decrease Indentation” icon can be used more than once if you are several levels deep in the sublist and the item needs to move more than one position to the left.
  - c. Once the item is in the correct position, move on to Step 5.
5. Format the new item if necessary. If you have moved the new item as a sub item (moved it right), the system will give it the same format as the parent. You can change the style of the sublist to something else if you prefer. See page 21 for more information on how to format a sublist item.
6. Add spacing as needed. See above for information on spacing items within a numbered list.

## Saving Policy Edits

1. Once you have completed the edits and formatting for your policy and are satisfied with your changes, click the “Save” button directly below the content editor to save your work.

Staff Position	Access to Files	Authorization Needed
HR Manager	Full access to all files	None
HR Clerk	Limited access based on need	HR Manager or CEO

body

Added to Working from Master: 02/10/14  
Last Master Revised: 01/01/11

Editor Note:

## Previewing Policy Edits

1. Click the “Preview Working” Button directly below the content editor to open a new window with a preview of the policy.

Staff Position	Access to Files	Authorization Needed
HR Manager	Full access to all files	None
HR Clerk	Limited access based on need	HR Manager or CEO

body

Added to Working from Master: 02/10/14  
Last Master Revised: 01/01/11

Editor Note:

2. Keep in mind that because the Preview function opens in an Internet browser window, it will not be an exact representation of the printed policy. The Preview function will show the policy title, any dates applied in the date fields, and all content, including Key Field content. However, page breaks are not shown, and margins will likely differ in the final printed version. Header and footer settings will also not be shown from the Print Preview window. For a true representation of the printed look, go to FILE > PRINT PREVIEW.

**Tip: The preview will only show you the content that has been saved.**



# Inserting Tables

While tables are not used extensively in HR Suite, they are a good tool to use for offsetting information, or displaying text items in a column.

To insert a table:

1. Make sure your cursor is in the exact position where you want the table inserted.

2. Click the “Insert/Edit Table” icon.



3. A form will pop up giving you some options to create your table. These are prefilled with default settings that can be changed. Below is some guidance on the most commonly used table properties:

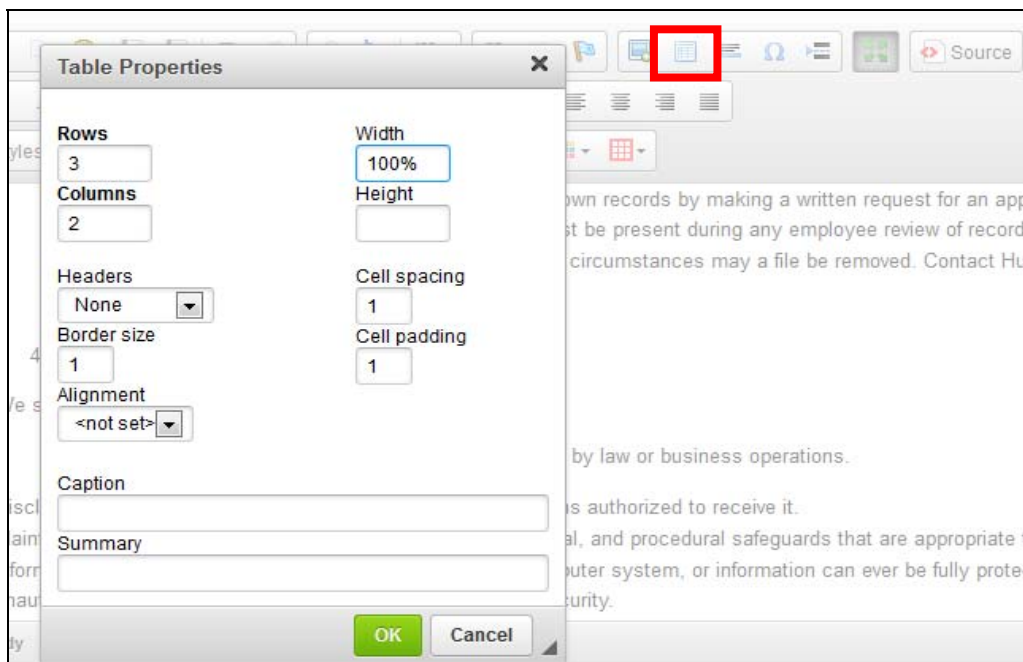
**Rows:** The number of rows for your table.

**Columns:** The number of columns for your table.

**Border Size:** The size of the border around your table. The larger the number, the thicker the border. A size of “1” is most common. A border of “0” will remove the gridlines, essentially creating a hidden table on the page. This is useful to create columns on a page.

**Alignment:** Aligns the table to the left, right or center of the page. If nothing is selected, the default is “left”.

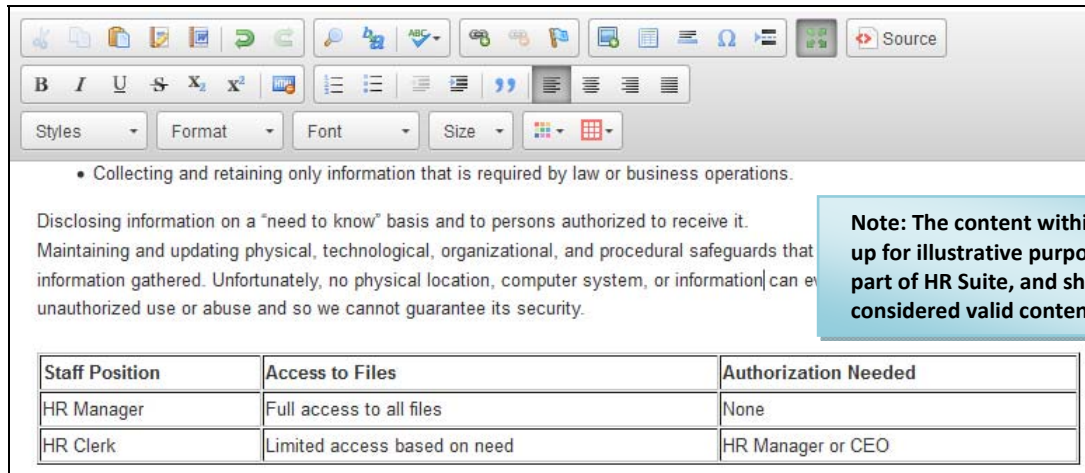
**Width:** The width of the entire table. While the default is 500 pixels, we recommend changing this to a percentage. Choose a number (usually between 50-100) and include the percentage sign.



5. When you have set your table options, click “OK” to insert your table.

## Inserting Tables (continued)

- Once the table is inserted, place your mouse in any cell and type or copy/paste in your content. For copy/paste, it is recommend to **paste as plain text**. Any formatting that can be done on text can be done on text within the table.



Collecting and retaining only information that is required by law or business operations.

Disclosing information on a "need to know" basis and to persons authorized to receive it.

Maintaining and updating physical, technological, organizational, and procedural safeguards that information gathered. Unfortunately, no physical location, computer system, or information can be unauthorized use or abuse and so we cannot guarantee its security.

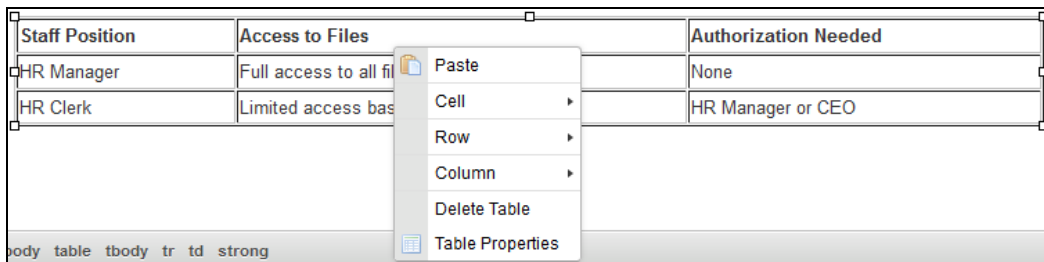
Staff Position	Access to Files	Authorization Needed
HR Manager	Full access to all files	None
HR Clerk	Limited access based on need	HR Manager or CEO

**Note: The content within this table is made up for illustrative purposes only, and is not part of HR Suite, and should not be considered valid content for the product.**

## Editing Tables

Once your table has been inserted, you can modify the entire table or just one of the table's cells.

- Put your cursor within the table and right click the mouse to view the available options to manipulate cells, rows, or columns.



Staff Position	Access to Files	Authorization Needed
HR Manager	Full access to all files	None
HR Clerk	Limited access based on need	HR Manager or CEO

body table tbody tr td strong

- Use the "Cell" option to set properties for an individual cell, including merging or splitting the current cell or adding a background color. Select "Cell Properties" under the Cell Options area to set the width of the first cell in each column. If Cell Width is set for a single cell within a column, this essentially sets width for the entire column. We recommend setting the cell width in percentages. This sets the cell width as a percentage of the entire table.

Make sure you only set the width for one cell in each column, or you may get an unexpected result. Also, if setting widths for cells in multiple columns make sure the sum does not exceed 100%!

- Use the "Row" option to add or remove rows. Place your cursor in a current row, and add rows above or below the current row.
- Use the "Column" option to add or remove columns. Place your cursor in a current column, and add columns to the left or right of the current column. The columns will automatically adjust based on the amount of text in each. To adjust column width, use the "Cell" properties (see #2 above).

## Using Editor Notes

Each policy has Editor Notes available directly beneath the content. These notes appear only on the editing screen of the individual policy or in the “Policy Notes Report.” See page 49 for more information on the Policy Notes Report.

Editor notes can be used to document what has been customized for a particular policy, or to document who made certain updates or changes to a policy. Organizations often use this documentation to determine how much custom content is included in any given policy versus the use of the model content, or to note that policy updates have been incorporated.

1. To add an Editor Note, type your comment in the “Editor Note” field.
2. Save the policy. **Tip: The Date and User Name will automatically be included with the Note, so it is not necessary to include this in the Note content.**

Staff Position	Access to Files	Authorization Needed
HR Manager	Full access to all files	None
HR Clerk	Limited access based on need	HR Manager or CEO

body

**Added to Working from Master: 02/10/14**  
**Last Master Revised: 01/01/11**

**Editor Note:**

3. Once the note is saved, the most recent five Editor Notes will show below the content. View the “Policy Notes Report” to see all Editor Notes if there are more than five.

Staff Position	Access to Files	Authorization Needed
HR Manager	Full access to all files	None
HR Clerk	Limited access based on need	HR Manager or CEO

**Added to Working from Master: 02/10/14**  
**Last Master Revised: 01/01/11**

**Editor Note:**

**Notes**

Date	Note By	Note
05/15/14 13:59	Mary Ann Koelzer	Added custom information on Accessing Staff files

# Key Fields Content

HR Suite model policy content includes a series of *Key Fields* to assist with customization of the model policies. Key Fields are bits of information which are important to completing the policy, but will vary from organization to organization. An example of a Key Field would be the time period for lunch breaks for full-time, non-exempt employees.

Not every policy has Key Fields, and some policies have many Key Fields. A full list of the Key Fields, which includes the location of each Key Field, the Key Field number, and a brief description of the Key Field, can be found in the *Key Fields Guide* document.

Within the content, a Key Field is a small piece of code. The Key Field code is typically a number enclosed in double brackets (e.g., `[[7040-1]]`). The first number of the Key Field correlates to the policy number, making Key Fields easy to find throughout the Manual.

For any policy that contains a Key Field, the Key Fields are listed directly below the content area. There is a link to the Key Field database editing window, a listing of the content entered for the Key Field, and a description of the Key Field.

**Note:** In certain instances, the same Key Field description may be found in both the Employee Handbook and the HR Manual; however, the Key Field databases are separate and do not cross between the manuals. You will need to define all Key Fields separately for each manual.

**Tip:** If the “Contents” of the Key Field is the Key Field number, the Key Field has not yet been defined.

The screenshot shows a software interface with a table of Key Fields. At the top are four buttons: 'Save', 'Preview Working', 'Archive', and 'Preview Last Published'. Below them is a section titled 'Key Fields' containing a table with three columns: 'Key Field', 'Contents', and 'Description'. The table lists three entries: 1) Key Field `[[7040-1]]`, Contents 'two', and Description 'Insert the number of authorized rest breaks for full-time, non-exempt employees (typically 2 per eight-hour shift)'. 2) Key Field `[[7040-2]]`, Contents '[7040-2]', and Description 'Insert time period for lunch breaks for full-time, non-exempt employees (typically 30 to 60 minutes)'. 3) Key Field `[[7040-3]]`, Contents '[7040-3]', and Description 'Insert time period for rest breaks (typically 15 minutes per break)'. A red box highlights the table. Three callout boxes with arrows point to the table: 'Link to Key Field Database' points to the Key Field column, 'Current Key Field Content. If the content is the Key Field number, the Key Field has not yet been defined.' points to the Contents column, and 'Description of what the Key Field will be defining.' points to the Description column.

Key Field	Contents	Description
<a href="#">[[7040-1]]</a>	two	Insert the number of authorized rest breaks for full-time, non-exempt employees (typically 2 per eight-hour shift).
<a href="#">[[7040-2]]</a>	[7040-2]	Insert time period for lunch breaks for full-time, non-exempt employees (typically 30 to 60 minutes).
<a href="#">[[7040-3]]</a>	[7040-3]	Insert time period for rest breaks (typically 15 minutes per break).

## Defining Key Fields

Key Fields can be defined one of two ways: At the individual policy level, which allows you to define the Key Fields for a single policy, or using the Multi-Key Fields Update, which allows you to define Key Fields for multiple policies at once.

### *Define Key Fields at the Individual Policy Level*

1. Click on the “Working Manual” tab at the top left of the screen to 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 a policy that contains Key Fields.
4. Go to the Key Fields area below the policy content, and click on the link to the Key Fields database.

Key Fields		
Key Field	Contents	Description
<a href="#">[[7040-1]]</a>	two	Insert the number of authorized rest breaks for full-time, non-exempt employees (typically 2 per eight-hour shift).
<a href="#">[[7040-2]]</a>	[7040-2]	Insert time period for lunch breaks for full-time, non-exempt employees (typically 30 to 60 minutes).
<a href="#">[[7040-3]]</a>	[7040-3]	Insert time period for rest breaks (typically 15 minutes per break).

Link to  
Key Field  
Database

5. A pop up box will open. Define the Key Field in the box labeled “Enter Your Key Field Content Here”. Remove the Key Field number as it is only an indicator that the Key Field has not yet been defined. If the Key Field number is not removed, it will print as part of the policy.
6. Click the “Update Key Field” button to save your changes.

**Edit Key Fields**

Name: 7040-2

Enter Your Key Field Content Here

45 minutes

Update Key Field Cancel

**Description**

Insert time period for lunch breaks for full-time, non-exempt employees (typically 30 to 60 minutes).

## Define Key Fields at the Individual Policy Level (Continued)

- Once you have updated the Content of the Key Fields, the content will not show up until the page is refreshed. The easiest way to do this is to save the policy. **Until the page is refreshed, you will not see your content in the Key Fields area.**
- After the page is refreshed and the custom content appears in the Key Fields area, the actual text within the policy will still show the bracketed Key Field number. This is because within the content of the policy, the bracketed Key Field number is a piece of code that will be replaced with the Key Field "Contents" once it is printed.
- Use the "Preview Working" button to see the Key Field replacement. Publishing the manual will also insert the correct text into the Key Field code area.

for staffing needs and operational demands. Managers may change break schedules as work situations dictate.

2. **Lunch Breaks.** A full-time, nonexempt employee is normally required to take a **[[7040-2]]** unpaid meal period during an eight hour workday. The length of the break may be changed if business needs require.

A. **Part-Time Employees.** Part-time employees who work more than one half of a day will also receive a meal break.

B. **Long Workdays.** Employees required to work two or more hours of overtime may also receive an additional unpaid meal period.

body

**Added to Working from Master: 02/10/14**  
**Last Master Revised: 08/31/13**

Editor Note:

Save Preview Working Archive Preview Last Published

**Key Fields**

Key Field	Contents	Description
[[7040-1]]	two	Insert the number of authorized rest breaks for full-time, non-exempt employees (typically 2 per eight-hour workday).
[[7040-2]]	45	Insert time period for lunch breaks for full-time, non-exempt employees (typically 30 to 60 minutes).
[[7040-3]]	[7040-3]	Insert time period for rest breaks (typically 15 minutes per break).

Text in the policy remains a piece of code.

"Contents" updates in the Key Fields area.

Section Preview: SECTION - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://hrsuite.hrnonline.com/mem/hrsuite\_manual/adm/section\_preview.php?passedid=!

breaks with appropriate consideration for staffing needs and operational demands. Managers may change break schedules as work situations dictate.

2. **Lunch Breaks.** A full-time, nonexempt employee is normally required to take a **45** unpaid meal period during an eight hour workday. The length of the break may be changed if business needs require.

A. **Part-Time Employees.** Part-time employees who work more than one half of a day will also receive a meal break.

B. **Long Workdays.** Employees required to work two or more hours of overtime may also receive an additional unpaid meal period.

In "Preview" (and published) mode, the Key Field code is replaced with the Key Field definition.

## Define Key Fields directly in the Key Fields Database

1. Click on the “Working Manual” tab at the top left of the screen to 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 the “Multi-Key Fields Update” link under the “MANUAL SECTION MANAGEMENT” folder.
4. On the right side of the screen, a full list of all Key Fields in the Key Fields database will show. **Note:** There are many Key Fields, so the Key Fields list is very lengthy. You will need to scroll to see all of the Key Fields.
5. Scroll to find the Key Field you want to define, and define the Key Field in the “Current Value” column (the third column to the right). Remove the Key Field number as it is only an indicator that the Key Field has not yet been defined. If the Key Field number is not removed, it will print as part of the policy.

The screenshot shows the 'Multi-Key Fields Update' interface. On the left, a navigation tree is expanded to 'MANUAL SECTION MANAGEMENT' and 'Multi-Key Fields Update'. The main area displays a table of key fields:

Key Field Name	Description	Current Value
4020-1	Insert the number of days jobs will be posted. Common posting periods range from 5-10 days.	[4020-1]
4020-2	Insert the time period that applications are considered active (typically 6 months).	[4020-2]
4030-1	Define "immediate relative" for the purposes of the nepotism policy. It typically includes parents, children, siblings, and in-laws of a similar degree.	[4030-1]

A callout box with the text "Define Key Fields in the 'Current Value' column." has three red arrows pointing to the 'Current Value' column for the three rows shown.

6. To save your Key Field definitions, scroll to the very end of the Key Fields listing and click the “Update” button. **This is very important!** If you leave the Multi-Key Fields update area without clicking the “Update” button, your changes will not be saved.

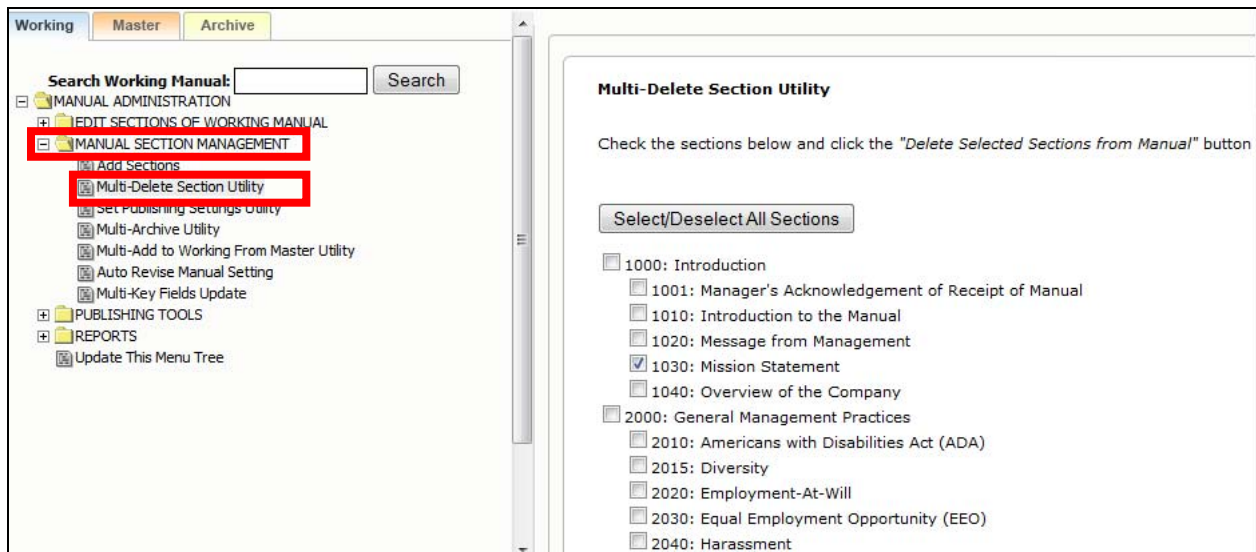
The screenshot shows the bottom of the 'Multi-Key Fields Update' interface. It displays two key fields:

8080-2	Insert specific vacation benefits for each length of service period (i.e., Length of Service = Vacation Days Per Year).	[8080-2]
9020-1	Insert the dollar amount suggested for maximum daily expenses (typically, amounts cover three meals ranging from \$25 to \$40 per day).	[9020-1]

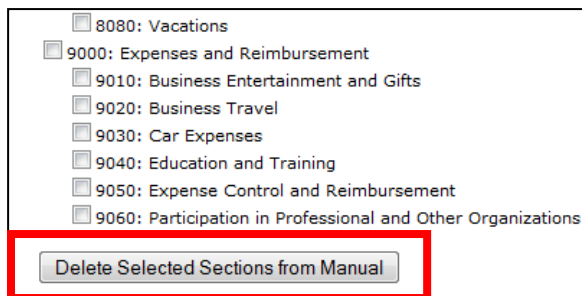
The 'Update' button at the bottom left is highlighted with a red box.

# Removing Policies from the Working Manual

1. Click on the “Working Manual” tab at the top left of the screen to 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 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.
8. Policies that are removed by mistake can be restored by the HR Suite support staff. Contact [policysupport@cusolutionsgroup.com](mailto:policysupport@cusolutionsgroup.com) for assistance.

**Note:** To delete an entire chapter, you must check all the policies within that chapter. Deleting just the chapter folder (1000, 2000, etc.) will only delete that chapter page, not all the policies within the chapter. If a top level chapter page is deleted, any policies within that chapter will no longer be accessible for editing in the Working Manual. They will, however, appear in the published manual.



# Auto Revise Manual Setting

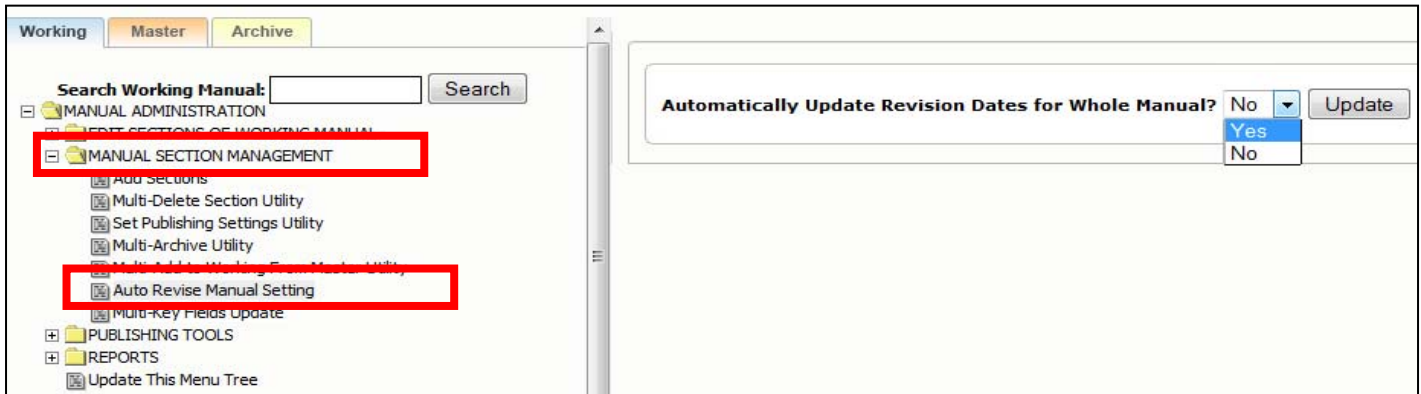
The “Auto Revise Manual Setting” tool allows you to automatically check or uncheck the “**Auto Update Revised Date**” button across all sections of the working manual.

This is the button found in the Toolbar when you are editing a policy:  **Auto Update Revised Date**

When this button is checked, clicking the “Save” button for that policy will insert the current date into the “Revised” field. If the button is not checked, you will need to manually insert a date if you want one in the “Revised” field.

To check the box in every policy in your working manual, change the dropdown under “Auto Revise Manual Settings” to “Yes” and click “Update”.

To un-check the box in every policy in your working manual, change the dropdown under “Auto Revise Manual Settings” to “No” and click “Update”.



## The Publishing Process

Each policy in the Working Manual can be thought of as an individual document. The process of publishing takes multiple policies and combines them into a printable document. Publishing does not remove any policies from the Working Manual but simply outputs the content to an electronic document. Publishing is a point-in-time process – all content in the published manual is as of the point it was published. If changes are made to any policy after it is published, those changes will not flow down to the published manual. You must re-publish in order to see any new changes.

The recommended steps for publishing are:

1. Review and, if necessary, update the “Publishing” settings.
2. Publish the Manual.

## The “Publishing” Setting

For any given publish, you can choose to include or not include any policy from the Working Manual by adjusting the “Publishing” Setting. You can also choose to include the most recently published version (if available) if the Working Manual version is in the process of being updated but you don’t want to include the changes yet. The “Publishing” Setting is a dropdown box found in the Toolbar area of each policy and can also be adjusted in the “Set Publishing Settings Utility”.

By default, the “Publishing” Setting on each policy will be set to “Include.” Once changed to “Do Not Include” or “Include Last Published Version”, that setting will remain until it is manually changed.

**Important Note! The “Publishing” Setting works differently for policies than for chapter pages.**

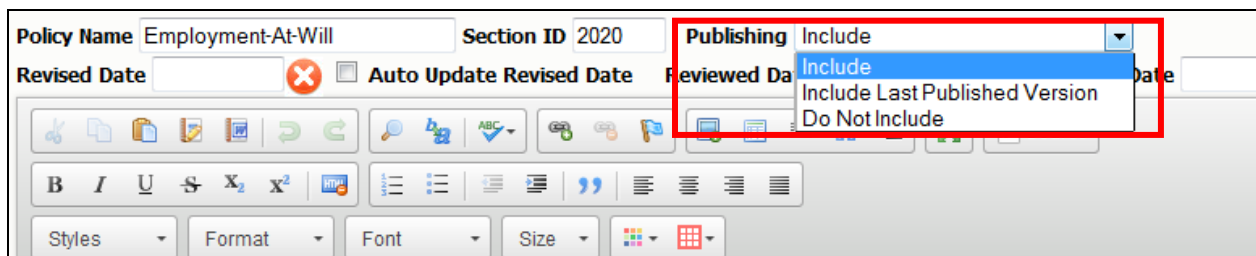
If the “Publishing” Setting is set to “Include” on a **specific policy**, the policy will be **included** in subsequent published manuals. If the “Publishing” Setting is set to “Do Not Include” on a **specific policy**, the policy will be **excluded** from any subsequent published versions. If the “Publishing” Setting is set to “Include Last Published Version” on a **specific policy**, the policy will **include the last published version**, regardless of what is currently in the Working Manual for that policy. Once set, the “Publishing” Setting will not change unless manually changed at the policy level or through the “Set Publishing Settings Utility”.

However, if the “Do Not Include” setting box is selected on a **chapter page**, **all policies** in the entire chapter will be **excluded** from any subsequent published versions until the setting is changed. Once selected, the “Publishing” Setting will not change unless manually changed. The chapter page “Publishing” setting effectively overrides the individual policy settings within the chapter. This makes it easy to exclude an entire chapter from the publishing process.

The “Publishing” Setting can be applied either to specific policies or chapter pages in one of two ways: 1) At the individual policy level, which allows you set the publishing setting for a single policy or chapter page, or 2) using the “Set Publishing Setting Utility”, which allows you to set the publishing setting for multiple polices and/or chapter pages at once.

## ***Setting the Publishing Setting for a Single Policy or Chapter Page***

1. Click on the “Working Manual” tab at the top left of the screen to 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 WORKING MANUAL” folders.
3. Open the policy or chapter page on which you wish to modify the “Publishing” Setting.
4. Use the dropdown box to determine the setting. “Include”, “Do Not Include”, or “Include Last Published Version”. This setting will be retained until it is manually changed. Remember that if the chapter page is set to “Do Not Include”, it will exclude all of the policies in the chapter from publishing, regardless of the individual policy settings.
5. Save the policy to save the setting.



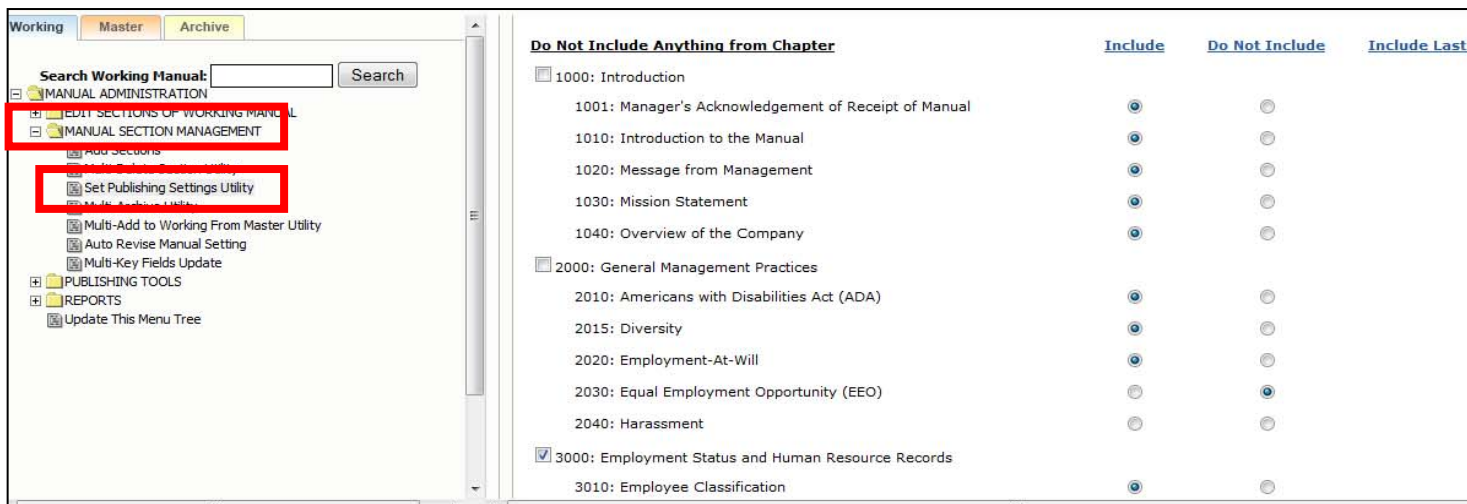
## ***Setting the Publishing Setting for Multiple Policies and/or Chapter Pages***

1. Click on the “Working Manual” tab at the top left of the screen to 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 “Set Publishing Settings 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 the publishing setting options next to each policy.
5. By default, new policies in the manual will be set to “Include”. If any policy has previously had the publishing setting changed, the radio button next to that policy will indicate the current publishing setting. Any chapter page that has been set to “Do Not Include” will have a checkbox next to the chapter page.
6. Review the current settings for each policy/chapter page, and make sure they are set correctly. Remember if the chapter page is set to “Do Not Include”, it will exclude all of the policies in the chapter from publishing, regardless of the individual policy settings.

## Setting the Publishing Setting for Multiple Policies and/or Chapter Pages (continued)

In the screen shot example below, for chapters 1000-3000, the following settings have been applied:

- Chapter 1000 – The chapter page (1000) is unchecked, and all individual policies are set to “Include”. Therefore, the current Working Manual version of all policies from Chapter 1000 will be included in the publish.
- Chapter 2000 - The chapter page (2000) is unchecked, the first three policies are set to “Include”, policy 2030 is set to “Do Not Include” and policy 2040 is set to “Include Last Published Version.” Therefore, the current Working Manual version of the first three policies will be included in the publish, policy 2030 will not be included in the publish, and policy 2040 will include the last published version rather than the content in the current Working Manual version.
- Chapter 3000 – The chapter page (3000) is checked. Therefore, because the top level chapter page 3000 has been checked, it will override the individual policy settings and all policies from Chapter 3000 will be excluded from the publish.



7. Once you have reviewed and adjusted the “Publishing” setting for all policies/chapters, scroll to the end of the page and click the “Update Publish Options” button.

**Note:** If you change the setting for a policy in the “Set Publishing Settings Utility”, that setting will be retained until it is manually changed.

**Update Publish Options**

### Important Notes:

- The Last Published version is determined by policy number. Please note that if the Working Manual has two or more policies with the same policy number, the last published version will be the same for all policies with that number. We recommend that all policies have a unique number.
- If a policy has a last published version and is removed from the Working Manual, and a new policy is added with the same policy number, the Last Published version of the deleted policy will be available until the newly added policy is published for the first time.

# Publishing the Working Manual

Before publishing, you should ensure that all “Publishing” settings have been applied. See previous section for more information.

1. Click on the “Working Manual” tab at the top left of the screen to 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 “PUBLISHING TOOLS” folders.
3. Click on the “Publish Manual” link in the “PUBLISHING TOOLS” folder.
4. On the right side of the screen, a series of options are presented to customize your published manual. See screen shot below. See next page for a description of what each option will do.

## Publish Manual: HRN Staff Manual

**You may change the name of your manual before you publish.**

**Published Manual Name**

**Click here to suppress the organizational name from the title page**

**Policy Order By Chapter**  
Order all policies in each chapter by:  Policy Number  Policy Name

**Include Chapter/Policy Numbers on Publish**  
In Table of Contents and Chapter/Policy Titles:  Yes  No

**Include Corporate Logo**  
Include your logo on the title page:  Include Logo

**Additional text on Title Page**  
To be placed just below the Manual Title and Organization Name:

**Select the Chapter Pages to Suppress in this Publish:**  
Each chapter level page included in the published manual generates a table of contents for that chapter (this is in addition to the full table of contents at the beginning of the document).  
To omit the table of contents (and any other content on that page) from this published manual, select the chapter page below.  
Note: This is not the same as the "DO NOT PUBLISH" option. This will simply suppress the content of the selected top level chapter page from this manual. It will not suppress any policies within the selected chapters.

- 1000: Introduction
- 2000: General Management Practices
- 3000: Employment Status and Human Resource Records
- 4000: Hiring Issues
- 5000: Employment Practices
- 6000: Employee Responsibilities
- 7000: Compensation and Benefits
- 8000: Time Off
- 9000: Expenses and Reimbursement

## Publishing the Working Manual (continued)

**Published Manual Name:** This will be the title of the published document. By default, the name of the Working Manual will be prefilled in this field (this is usually “HR Policy Manual” or “Employee Handbook”, unless you have renamed the Working Manual). It is recommended that if you are not publishing the entire manual to be specific when titling your manual (i.e. Time Off Policies, Policies for Board Review on 11-15-14, Employee Handbook Policies Revised 5/15/15, etc.). This will help all users viewing published manuals know what content to find in each published document.

**Suppress Organization Name:** By default, the organization name will print on the title page of the published manual. Checking this box will omit the organization name from the title page.

**Policy Order by Chapter:** This setting allows you to determine how the policies will be ordered within each chapter. The choices are by policy number or alphabetical by policy name. The Chapters themselves will always remain in numerical order. This setting only applies to the policies within the Chapters.

**Include Chapter/Policy Numbers on Publish:** This setting allows you to determine if the Chapter and Policy Numbers will show next to the policy title. Typically organizations set this to “Yes” if the policy order is by policy number, and to “No” if the policy order is alphabetical by policy name.

**Include Corporate Logo:** This option is only available if a Corporate Logo has been uploaded. (See page 63 for information on uploading your logo). If checked, the logo will appear on the title page of the published manual.

**Additional Text on Title Page:** This allows the user to add more information on the title page of the manual. It is recommended to put the date of publishing in this box, along with any other information relevant to the set of policies being published. Example: This published manual contains 8 policies that were revised and published on 5/14/14.

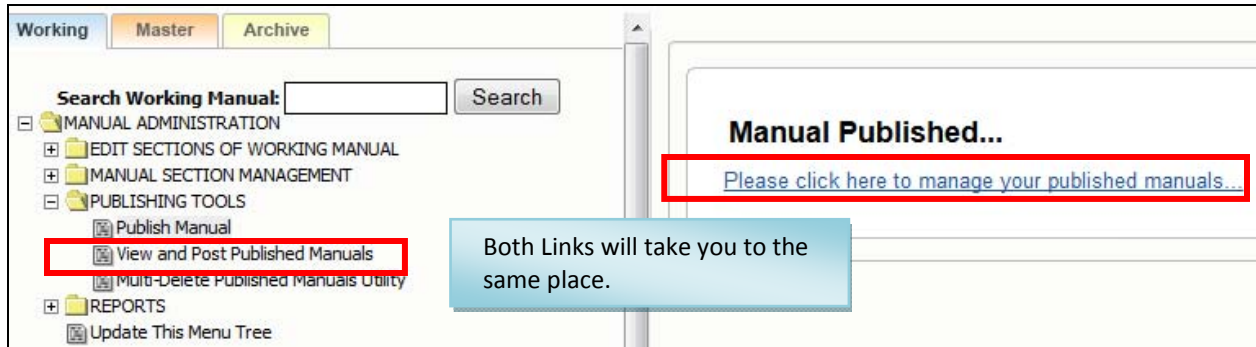
**Select the Chapter Pages to Suppress in Publishing:** This setting allows any or all Chapter page content included in the publish to be excluded from the document. This is not the same thing as “Do Not Include”. A top level Chapter page *must* be included in the publish in order for any policies within that chapter to appear, however, you may not want the content of the Chapter page itself to show in the publish. Typically the top level chapter content is a table of contents for the chapter, and in certain instances, a table of contents at the beginning of each chapter may be considered unnecessary.

**Tip: Reviewing the chapters in this setting is a good check of what content is included in the publish. Only policies from the listed chapters will be included in the publish. If a chapter is listed but you did not expect to have policies from that chapter included, or if you do not see a chapter listed, but you did expect to have policies from that chapter, it is a good indication that you need to revise the “Publishing” settings.**

5. Once you have chosen all your options, click the “Publish Manual” button.
6. Once you have published, a message will appear that the publishing process may take several minutes. Click OK.
7. When the manual is published, a link titled “Please click here to manage your published manual” will appear. **Note:** This will take you to the same place as the “View and Post Published Manuals” link on the left navigation. Click the link to access this published version, as well as any other previously published manuals.

## View, Print and Post Published Manuals

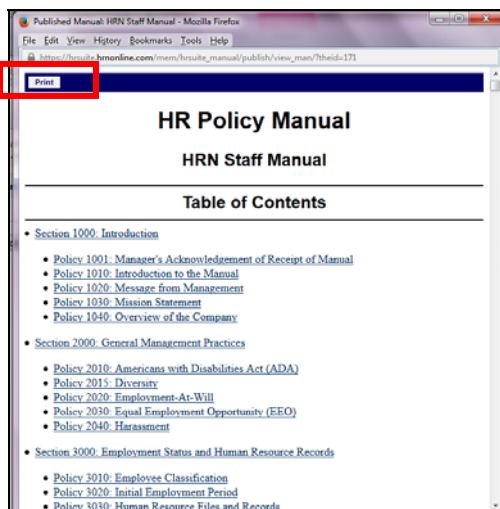
1. Click on the “Working Manual” tab at the top left of the screen to make sure you are in the Working Manual.
2. Using the plus signs to the left of each folder, expand the “MANUAL ADMINISTRATION” and the “PUBLISHING TOOLS” folders.
3. Click on the “View and Post Published Manuals” link in the “PUBLISHING TOOLS” folder. **Note:** If you have just published a manual, a link titled “Please click here to manage your published manual” will appear on the right side of the screen. This will take you to the same place as the “View and Post Published Manuals” link. See screen shot below.



4. The “View and Post Published Manuals” area lists all published manual versions in date order, with the most recently published version at the top of the list. Published manuals can be viewed, printed, and posted on the Home Page of HR Suite for staff to access.

## Viewing and Printing a Published Manual

1. To view or print a published manual, click on the link (the name) of the published manual from the “View and Post Published Manuals” screen. This will open a new window showing the content of that published manual that can be viewed on the screen.
2. To print the manual, click on the “Print” button in the top left corner to print the published manual. See Appendix B for Printing Tips.



A new window opens with the published manual in printable form.

## Posting Published Manuals on the Home Page

Links to published manuals can be made available on the Home Page, within the “Manager Manuals” and/or the “Employee Manuals” folders. Remember, the “Employee Manuals” folder is available to anyone from the organization with an HR Suite login, while the “Manager Manuals” folder is only available to a full admin, or a user with access rights to see what is in that folder.

1. Use the check boxes directly underneath any published manual to determine if the link will appear in the “Manager Manuals” (“Allow Managers to View” checkbox) the “Employee Manuals” (“Allow Employees to View” checkbox) or both.

**Tip: It is recommended to check only one box. If a published manual is placed in the “Employee Manuals” folder, it is viewable by all HR Suite users from the organization and does not need to also be placed in the “Manager Manuals” folder.**

2. Click the “Update Access” button when finished.

<a href="#">HR Policy Manual</a> (published: December 2nd, 2013 12:17:13 PM) <input type="checkbox"/> Allow Employees to View <input type="checkbox"/> Allow Managers To View
<a href="#">HR Policy Manual</a> (published: December 2nd, 2013 11:48:36 AM) <input type="checkbox"/> Allow Employees to View <input type="checkbox"/> Allow Managers To View
<a href="#">HR Policy Manual</a> (published: December 31st, 2012 04:50:24 PM) <input type="checkbox"/> Allow Employees to View <input type="checkbox"/> Allow Managers To View
<a href="#">HR Policy Manual</a> (published: December 31st, 2012 01:37:20 PM) <input type="checkbox"/> Allow Employees to View <input type="checkbox"/> Allow Managers To View
<a href="#">HR Policy Manual</a> (published: December 31st, 2012 01:28:42 PM) <input type="checkbox"/> Allow Employees to View <input type="checkbox"/> Allow Managers To View
<input type="button" value="Update Access"/>

## Removing Published Manuals from the Home Page

1. To remove a manual from the home page, unclick the “Allow Managers to View” and/or the “Allow Employees to View” checkbox.
2. Click the “Update Access” button when finished.

## Additional Notes About Publishing

Publishing is a point in time process. When policies are published, the system will take a copy of the content in the Working Manual for the selected policies (or the content from the previously published manual, if selected), and put that content into the published manual document. Subsequent changes to the Working Manual will not flow to the published manual. You will need to re-publish in order to see any new changes.



## Deleting Published Manuals

1. Click on the “Working Manual” tab at the top left of the screen to 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 “PUBLISHING TOOLS” folders.
3. Click on the “Multi-Delete Published Manuals Utility” link in the “PUBLISHING TOOLS” folder.
4. A list of all published manuals will show on the right side of the screen.
5. Click the checkbox next to any published manual you wish to delete.
6. Click the “Delete Published Manuals” button. **Note:** Deleted manuals cannot be recovered.



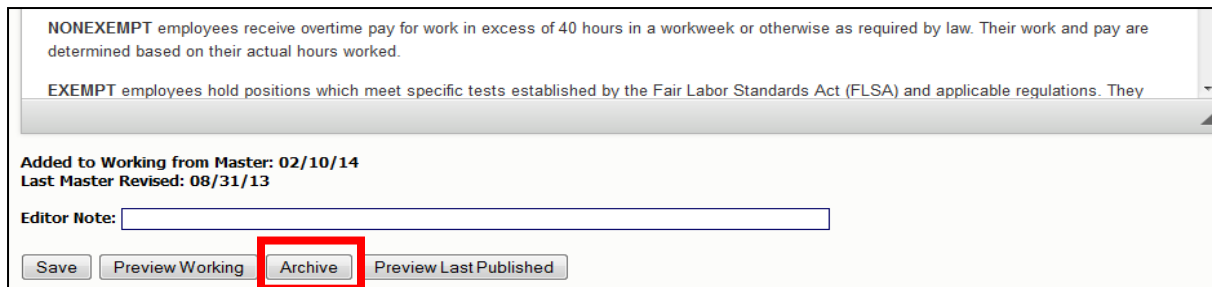
# Archiving Policies

If you wish to make a copy of a policy before making changes to it, you can place a copy in the Archive. This section describes how to add policies from the Working Manual into the Archive. See pages 44-45 for information on viewing policies in the Archive and restoring policies from the Archive back into the Working 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. Click on the “Working Manual” tab at the top left of the screen to 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 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.



The screenshot shows a policy editor interface. At the top, there is a scrollable area with text: "NONEXEMPT employees receive overtime pay for work in excess of 40 hours in a workweek or otherwise as required by law. Their work and pay are determined based on their actual hours worked." Below this is another line of text: "EXEMPT employees hold positions which meet specific tests established by the Fair Labor Standards Act (FLSA) and applicable regulations. They". Below the text, there is a section titled "Added to Working from Master: 02/10/14" and "Last Master Revised: 08/31/13". Underneath is an "Editor Note:" field with a text input box. At the bottom, there are four buttons: "Save", "Preview Working", "Archive", and "Preview Last Published". The "Archive" button is highlighted with a red rectangular box.

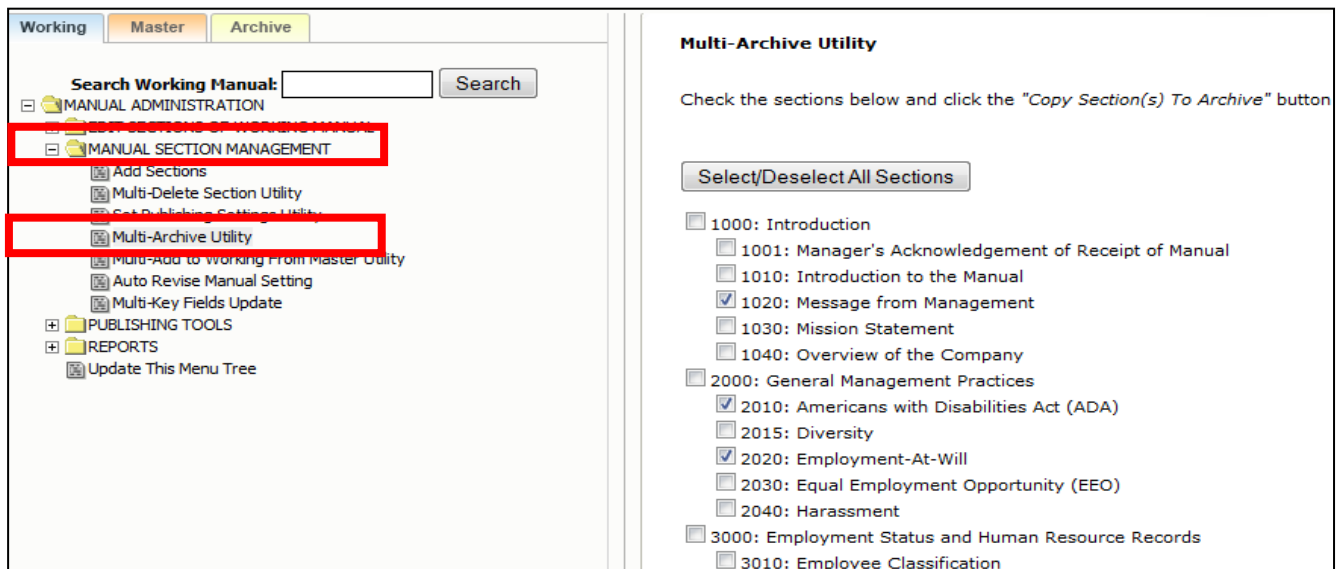
5. Once in the Archive, the archived version of the policy can be viewed, printed or restored back to the Working Manual.

**Archive Tip #1:** 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. Model Policies that have not been customized do not need to be archived. Any model policy can be accessed at any time from the Master Manual. This will help keep your Archive area easier to maintain.

**Archive Tip #2:** Many organizations want to archive a yearly (or semi-annual) copy of all policies for historical purposes. Often the policies have not changed, but a full point in time copy of all polices is required. If you are archiving the entire manual for historical purposes, it is recommended that you Publish the manual and retain the Published Manual as the historical archive. This will help keep your Archive area easier to maintain. Keep in mind that a published manual version of a policy cannot be restored back to the Working Manual, but often the historical archive is not meant for that purpose.

## Archive Multiple Policies at One Time

1. Click on the “Working Manual” tab at the top left of the screen to 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 you want to archive.

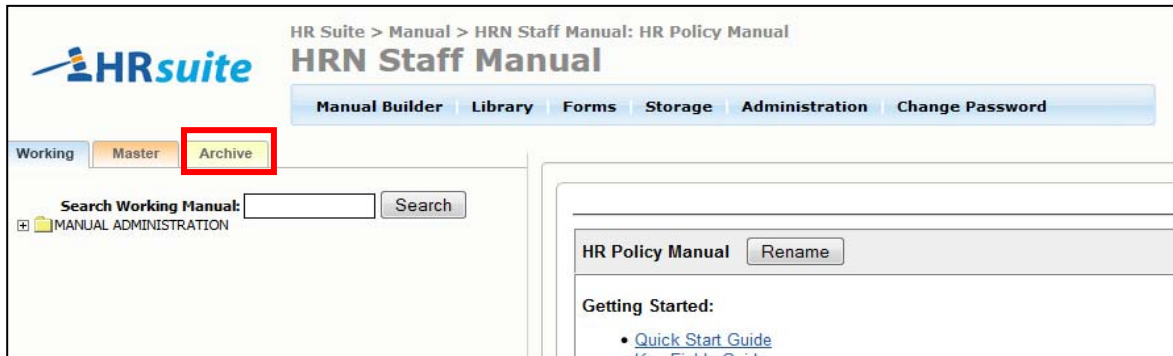


6. Scroll to the end of the page and click the “Copy Section(s) to Archive” button.

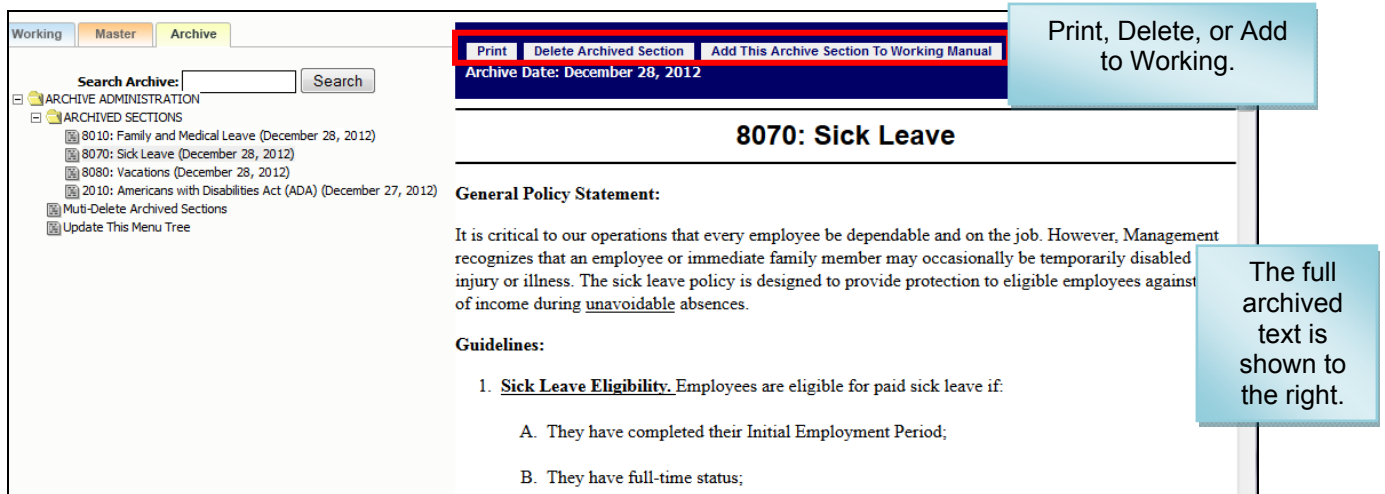


# Accessing the Archive

1. Click on the “Archive” tab at the top left of the screen to make sure you are in the Archive.



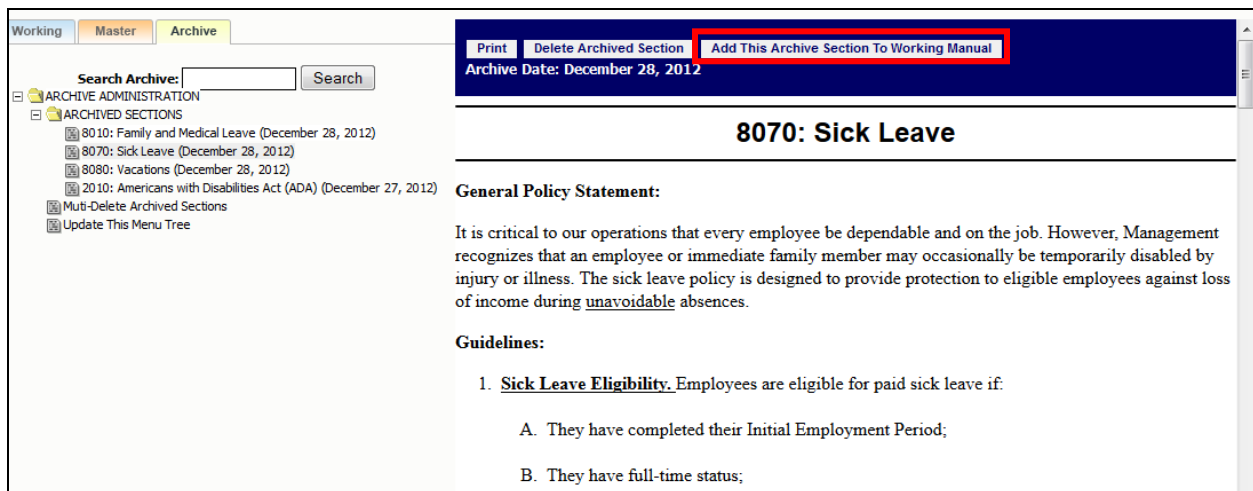
2. Using the plus signs to the left of each folder, expand the “ARCHIVE ADMINISTRATION” and the “ARCHIVED SECTIONS” folders. A listing of all archived policies is available underneath the “ARCHIVED SECTIONS” folder. Archived policies are in descending date order.
3. Click on any of the archived sections and the full text of that archived policy will appear on the right hand side of the screen.
4. Using the buttons above the content, you can view and print the text, as well as delete the archived policy, or copy this entire policy back into your Working Manual.



## Un-Archiving a Policy

**Tip:** When un-archiving, be sure to first remove the unwanted policy version from your Working Manual (see page 32), then un-archive the proper version of the policy. Un-archiving a policy will not overwrite the policy in the *Working Manual*. If you do not remove the unwanted policy first, you will then have two policies (the correct and the incorrect) in your Working Manual.

1. Click on the “Archive” tab at the top left of the screen to make sure you are in the Archive.
2. Using the plus signs to the left of each folder, expand the “ARCHIVE ADMINISTRATION” and the “ARCHIVED SECTIONS” folders. A listing of all archived policies is available underneath the “ARCHIVED SECTIONS” folder.
3. Click on the policy you wish to un-archive.
4. Click the “Add This Archive Section to Working Manual” button, and the policy is now added back to your Working Manual.



The screenshot displays a web application interface with three tabs at the top: "Working", "Master", and "Archive". The "Archive" tab is selected. On the left, a search bar is labeled "Search Archive:" with a "Search" button. Below it, a tree view shows "ARCHIVE ADMINISTRATION" expanded to "ARCHIVED SECTIONS", which lists several archived policies, including "8070: Sick Leave (December 28, 2012)". On the right, a dark blue header bar contains three buttons: "Print", "Delete Archived Section", and "Add This Archive Section To Working Manual". The "Add This Archive Section To Working Manual" button is highlighted with a red box. Below the header, the title "8070: Sick Leave" is displayed. The main content area shows the "General Policy Statement" and "Guidelines" for the sick leave policy.

Working Master Archive

Print Delete Archived Section Add This Archive Section To Working Manual

Archive Date: December 28, 2012

8070: Sick Leave

**General Policy Statement:**

It is critical to our operations that every employee be dependable and on the job. However, Management recognizes that an employee or immediate family member may occasionally be temporarily disabled by injury or illness. The sick leave policy is designed to provide protection to eligible employees against loss of income during unavoidable absences.

**Guidelines:**

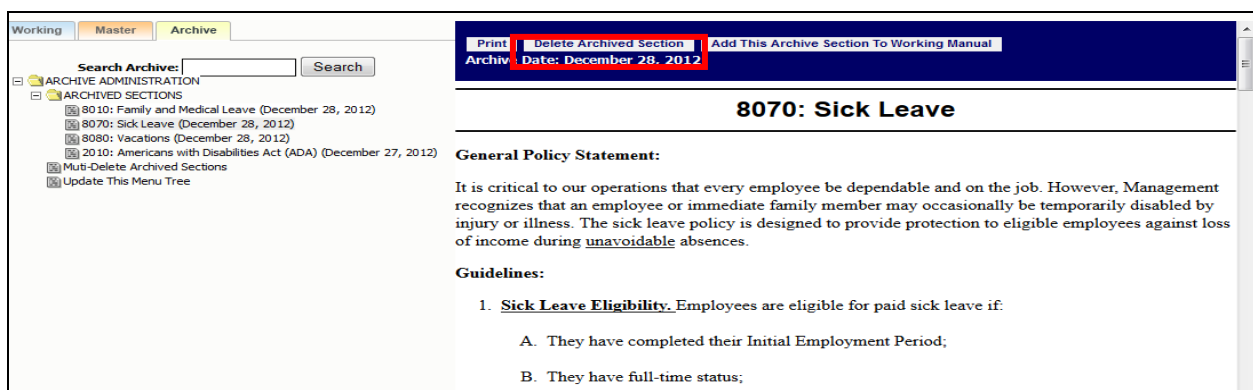
1. **Sick Leave Eligibility.** Employees are eligible for paid sick leave if:
  - A. They have completed their Initial Employment Period;
  - B. They have full-time status;

## Deleting Archived Policies

Policies can be deleted from the Archive in one of two ways: At the individual archived policy level, which allows you to view the content of the archived policy before deletion, or using the Multi-Delete Archived Utility, which allows you to delete multiple archived policies at one time.

## Deleting a Single Archived Policy at the Archived Policy Level

1. Click on the “Archive” tab at the top left of the screen to make sure you are in the Archive.
2. Using the plus signs to the left of each folder, expand the “ARCHIVE ADMINISTRATION” and the “ARCHIVED SECTIONS” folders. A listing of all archived policies is available underneath the “ARCHIVED SECTIONS” folder.
3. Click on the archived policy that you want to delete.
4. The archived text will appear on the right side of the screen.
5. Click the “Delete Archived Section” button above the content.
6. A confirmation box will pop up asking you to confirm the deletion. Click OK.



## Deleting Multiple Archived Policies at one Time

1. Click on the “Archive” tab at the top left of the screen to make sure you are in the Archive.
2. Using the plus signs to the left of each folder, expand the “ARCHIVE ADMINISTRATION” and the “ARCHIVED SECTIONS” folders. A listing of all archived policies is available underneath the “ARCHIVED SECTIONS” folder.
3. Click on the “Multi-Delete Archived Sections” link in the navigation. This is found under the listing of the archived sections (if your archive is very full, you may need to scroll to see this link).
4. This will bring up a list of all policies currently in the Archive, with a checkbox next to each.
5. Check the checkbox next to each archived policy that should be deleted.
6. Click the “Delete Selected Sections from Archive” button.
7. A confirmation box will pop up asking you to confirm the deletion. Click OK.

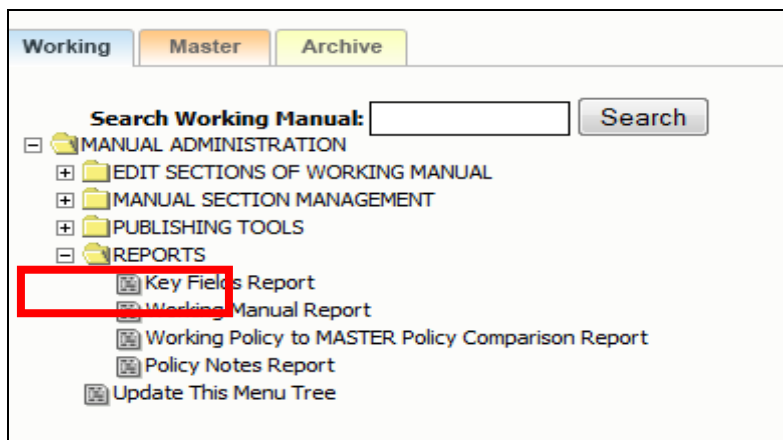


# Reports

A series of reports are available to help you better manage your policies. All reports are read only.

## ***To access reports:***

1. Click on the “Working Manual” tab at the top left of the screen to 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 “REPORTS” folders.
3. Click on report you want to review.
4. The report information will appear on the right side of the screen.



## ***Report Features***

1. A quick summary of what is included in each report is available in the following section of the User’s Guide.
2. All reports can be viewed on screen or printed.
3. Column headings in any report that show as a link can be clicked to resort the report by that column.

## ***Key Fields Report***

- The “Key Fields Report” is a quick view of all the Key Fields in the system and how each has been defined.
- Key Fields that are not defined will show as the key field code (example [7150-1]) in the Current Value column.

## ***Working Manual Report***

- The Working Manual Report will show key dates for all of the policies in the Working Manual, including the “Last Saved”, “Revised”, “Reviewed”, “Approved”, “Added to Working from Master” and “Master Revised” dates.
- **Last Saved** is a date stamp from the last time someone clicked “Save” while in the policy. If this date = NONE, then the policy has never been saved since being added to the Working Manual, which indicates that no customization has been done.
- **Revised/Reviewed/Approved** are date fields set at the individual policy level by the policy editor. If the date = NONE, it has not been set or is not being used by the policy editor.
- **Added to Working from Master** is the date the model policy was copied from the Master Manual into the Working Manual. The “Added to Working from Master” date is often reviewed in conjunction with the “Master Revised Date” (see below). If this date = NONE, it indicates that it was added as a unique policy and was not moved to the Working from the Master.
- **Master Revised Date.** This indicates the date of the last revision to the model policy content in the Master Manual. If this date = NONE, it indicates that there is no Master Manual version for this policy number. The “Master Revised Date” can be used in conjunction with the “Last Saved” and “Added to Working from Master” dates to help determine if all updates are included in the policy.

**Note:** If an organization creates a unique policy with the same policy number as a Master Manual policy, the “Master Revised Date” will still appear as it is based on the policy number, and not the title or the content of the policy.

## ***Working Policy to MASTER Policy Comparison Report***

- This report compares the content in all Working Manual policies to the content in the Master Manual. This is based on policy number – if the policy number exists in the Working Manual, the report will compare it to the policy in the Master Manual with the same number.
- This report will simply display if the content matches or not. It does not give any additional information about what the differences are.
- Content that does not match could be the result of customization by the organization, updates to the Master Manual that have not been incorporated into the Working Manual, or a combination of both.
- **Note:** If an organization creates a unique policy with the same policy number as a Master Manual policy, the report will compare it with the Master Manual model policy as it is based on the policy number, and not the title or the content of the policy.
- **Comparison Results** will compare the title of the Working Manual policy to the title of the model policy in the Master Manual, and compare the body of the content. The result will indicate if the policy title matches, and whether or not the content matches. The comparison looks for an exact match, so even if there is one minor difference in the content, the report will indicate that the content does not match.



## ***Working Policy to MASTER Policy Comparison Report (continued)***

- **Exists in Master** indicates if the policy number exists and has been assigned to a model policy in the Master Manual. If a unique policy has been added and assigned the same number as a Master policy, this field will indicate that the policy exists in the Master, even if the policies contain different content.
- **Last Saved** is a date stamp from the last time someone clicked “Save” while in the policy. If this date = NONE, then the policy has never been saved since being added to the Working Manual, which indicates that no customization has been done.
- **Master Revised Date**. This indicates the date of the last revision to the model policy content in the Master Manual. If this date = NONE, it indicates that there is no Master Manual version for this policy number. The “Master Revised Date” can be used in conjunction to the “Last Saved” and “Added to Working from Master” dates to help determine if all updates are included in the policy.
- **Added to Working from Master** is the date the model policy was copied from the Master Manual into the Working Manual. “Added to Working from Master” date is often reviewed in conjunction with the “Master Revised Date” (see below). If this date = NONE, it indicates that it was added as a unique policy and was not moved to the Working from the Master.

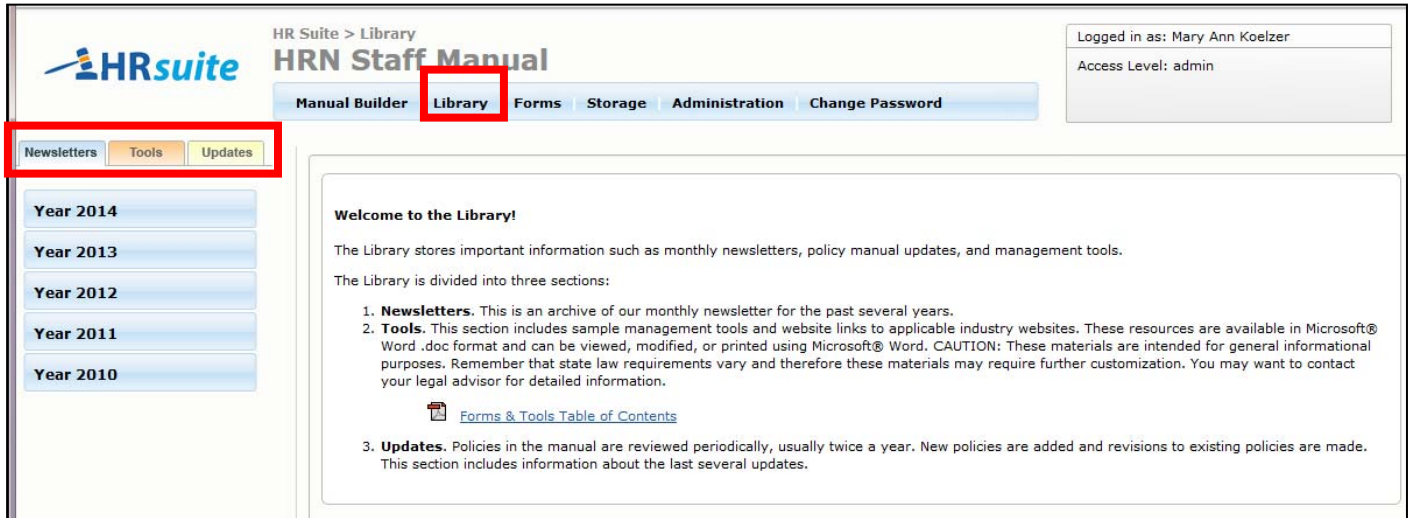
## ***Policy Notes Report***

- The Policy Notes Report will show all editor notes for all policies in the Working Manual.

# Library

Click on “Library” in the top navigation to access the HR Suite Library. This is a “read only” area where you can find archived newsletters, tools, and information on content updates.

Click on the tabs on the left side of the screen to view each area of the library.



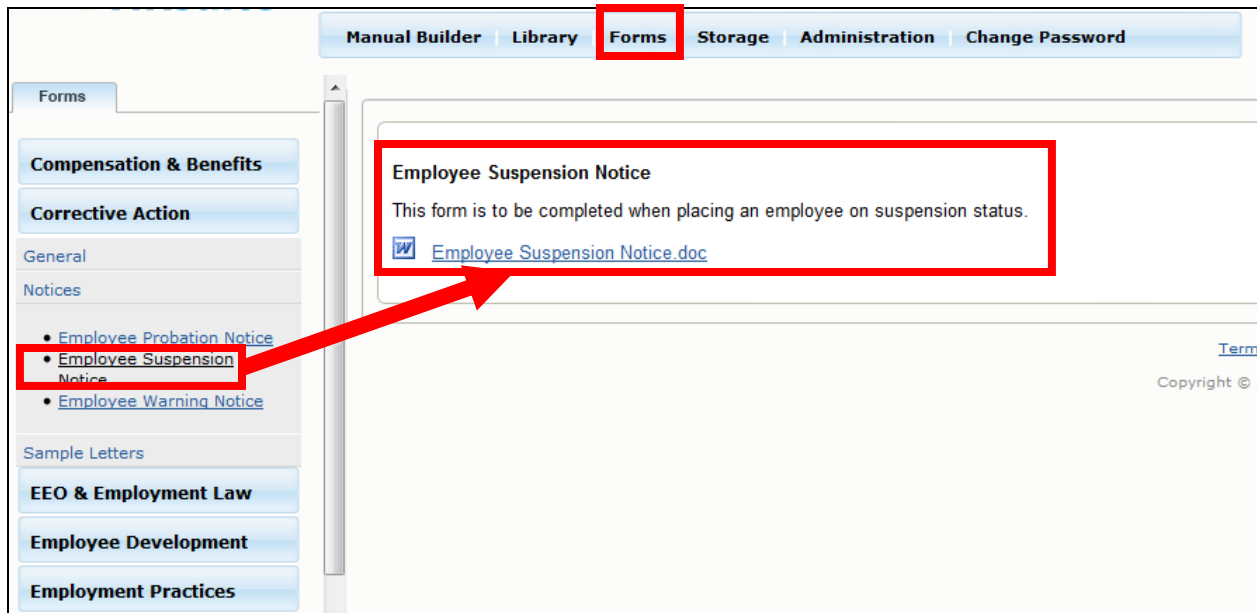
The Library is divided into three sections:

1. **Newsletters.** This contains an archive of the past several years' worth of the monthly newsletters.
2. **Tools.** The Tools section includes sample management tools and website links to applicable industry websites.
3. **Updates.** HR Suite is updated semi-annually. New policies are added and revisions to existing text are made. Past Updates are stored in this tab for your review. Older updates are periodically purged from the Updates tab.

To access any of the items in the Library, simply click on the tab you wish you access (Newsletters, Tools or Updates) and a new left navigation menu will appear. Click on the navigation button for the content category, then click on the content item you wish to view. **Note:** Some of the content items also have sub-category buttons. When you click on the link to a document, it will open in a new window.

# Forms

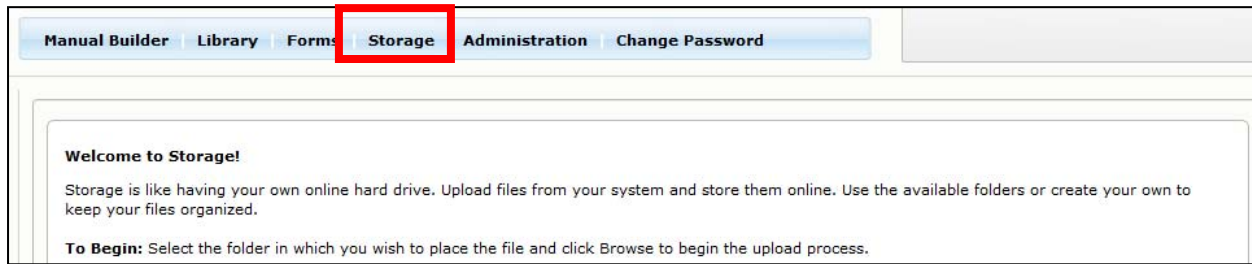
Click on “Forms” in the top navigation to access the HR Suite Forms. This is a “read only” area where you can find sample forms covering a variety of HR topics. These are in Word and can be saved locally and customized to your organization’s needs.



To access any of the Forms, click on the navigation button for the content category, then click on the content item you wish to view. **Note:** Some of the content items also have sub-category buttons. When you click on the navigation to select a document, a link to the document will open on the right side of the screen along with additional information about the Form. Click the link to open the Form.

# Storage

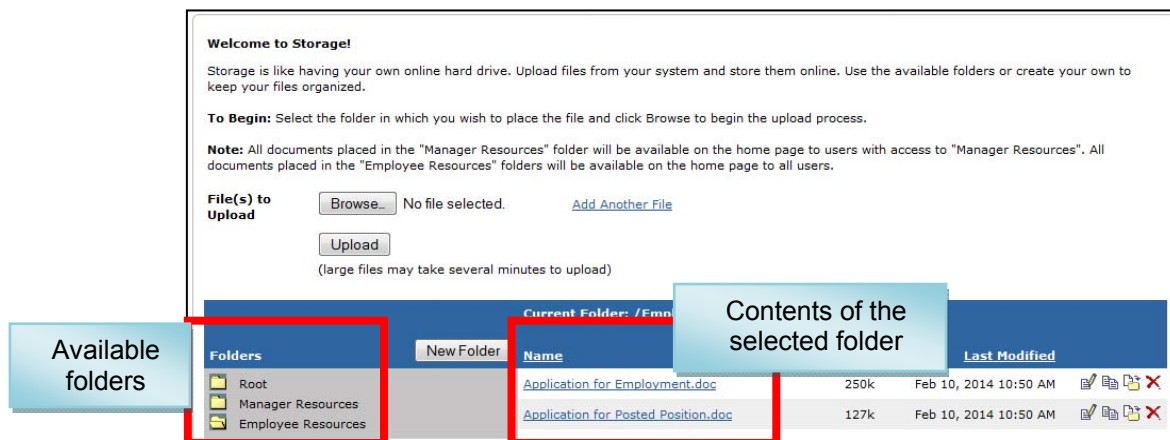
Click on “Storage” in the top navigation to access the HR Suite Storage area.



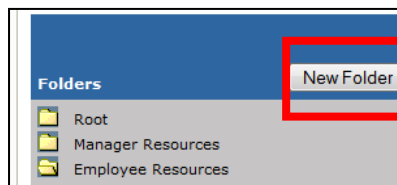
The Storage area allows you to upload and store documents. Once in storage, documents can be posted to the Home Page, either in the “Manager Resources” or “Employee Resources” folder.

## Storage File Structure

1. By default, the Storage area contains three folders: “Root”, “Employee Resources”, and “Manager Resources”.
2. Click on the folder name and the contents of that folder will be displayed in the center section of the screen.

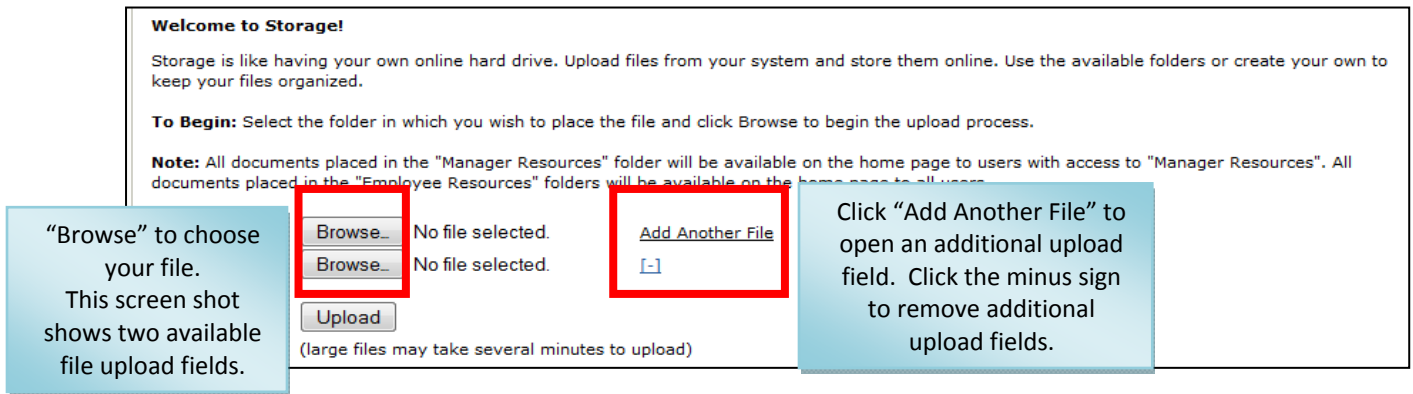


3. The “Employee Resources” and “Manager Resources” folders serve a special function. Any documents placed in these folder will be posted to the corresponding folders on the Home Page.
4. Additional folders can be created by clicking the “New Folder” button next to the Folders listing. You can create subfolders to existing folders. **Note:** Subfolders and their contents are available from the Storage area, but will not be posted on the home page, even if the subfolders are created within the Employee Resources” or “Manager Resources” folders

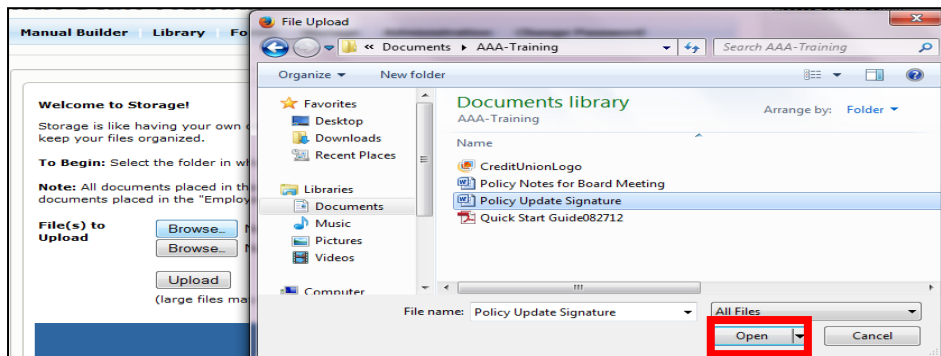


# Uploading Files to Storage

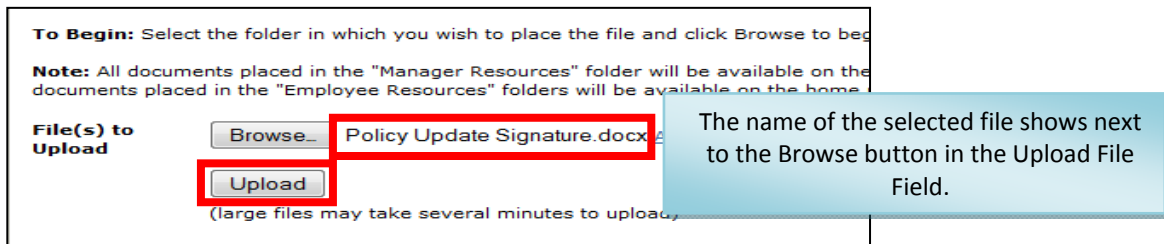
1. Click the folder to which you wish to upload your document.
2. To upload a document, click the “Browse” button next to the File Upload field. **Note:** Depending on the internet browser you are using, the “Browse” button may be named something other than “Browse.” This will allow you to browse your computer hard drive or network to choose a file. **Note:** To upload multiple documents, click the “Add Another File” link. You can add as many upload fields as you need.



3. Once you've found the file, to upload, click on the file name, then click the “Open” button on the dialogue box. **Note:** Again, depending on your browser, your screen may appear slightly different than the screen shot below.



4. The name of the file will now appear in the file upload field. Click the “Upload” button, and the file will be uploaded.

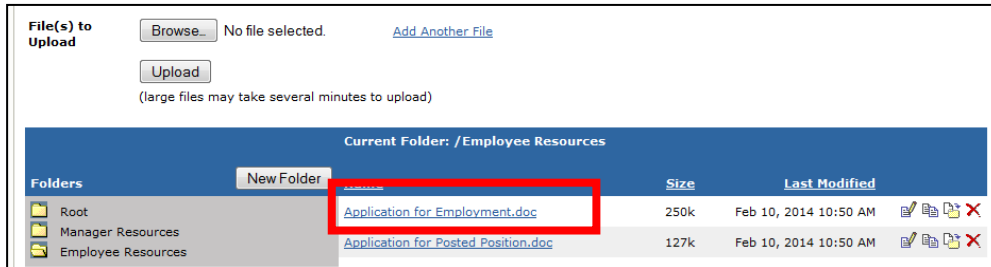


**Note:** The Storage area supports the upload of multiple file types, such as Microsoft Office, Text, PDF, etc. However, when opening files, the computer you are working on must have that program available in order to access the file. This can sometimes be an issue when opening the file from a remote location.

**Note:** File size is limited to 2MB. Files over this size cannot be uploaded.

## Opening Files in Storage

1. Once a file is in the *Storage* area, it can be opened by clicking on the file name. This will open the file in the program the file was originally created.

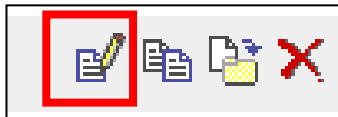


## Making Changes to Files in Storage

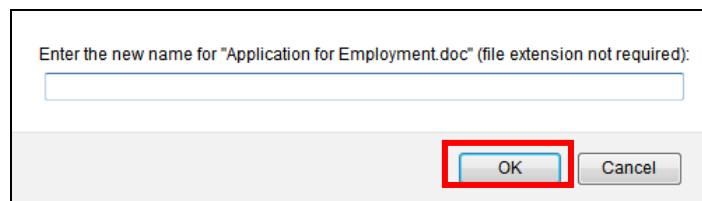
1. If any changes are made to the file after it is uploaded, the file must first be saved locally, then the updated document re-uploaded to Storage. It is recommended that you remove the old file before uploading the updated file.
2. Files within the Storage area can be renamed, copied, moved to a different folder or deleted.

## Renaming Files in Storage

1. To rename a file, click on the “rename” icon to the far right of the file name.



2. A dialogue box will open to allow you to rename the file. Enter the new name and click “OK”.



## Copying Files in Storage

1. To create a copy of a document, click the “Copy” icon to the far right of the file name.



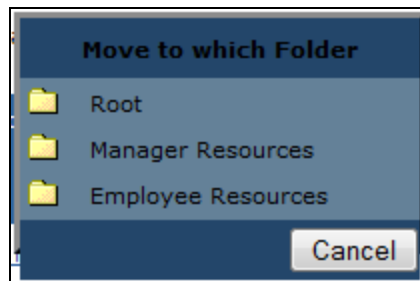
2. This will create a copy of the file, named “Copy of (file name)”. You can then rename or move this file, if desired.

## Moving Files between Folders in Storage

1. To move a document to a different folder in the the Storage area, click the “Move” icon to the far right of the file name.



2. A dialogue box will open showing all available folders. Click the name of the folder where you want the document to move. This will move the document to that folder. Remember, any documents placed in the “Employee Resources” or the “Manager Resources” folders will be available on the Home Page.



## Deleting files in Storage

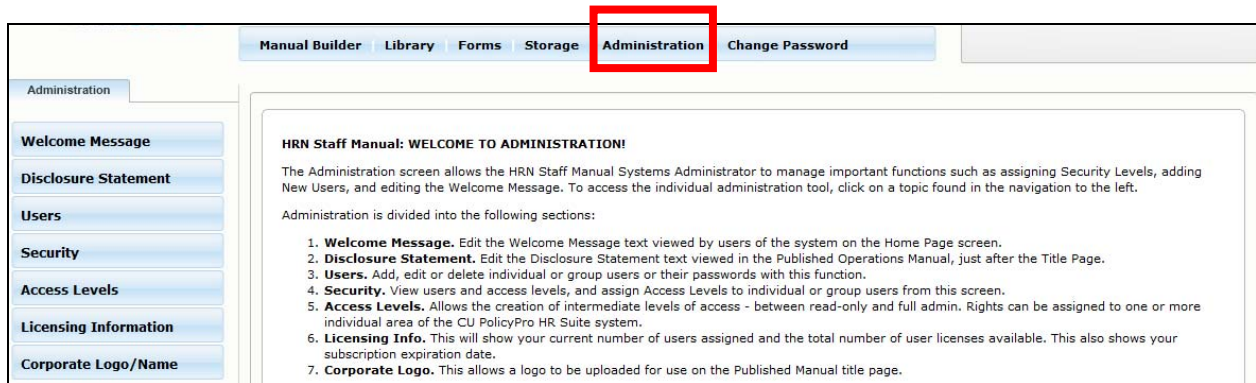
1. To delete a document from the Storage area, click the “Delete” icon to the far right of the file name.



2. This will permanently delete the document from the Storage area. If this document is deleted from the “Employee Resources” or the “Manager Resources” folders, it will no longer appear on the Home Page.

## Administration

Click on “Administration” in the top navigation.

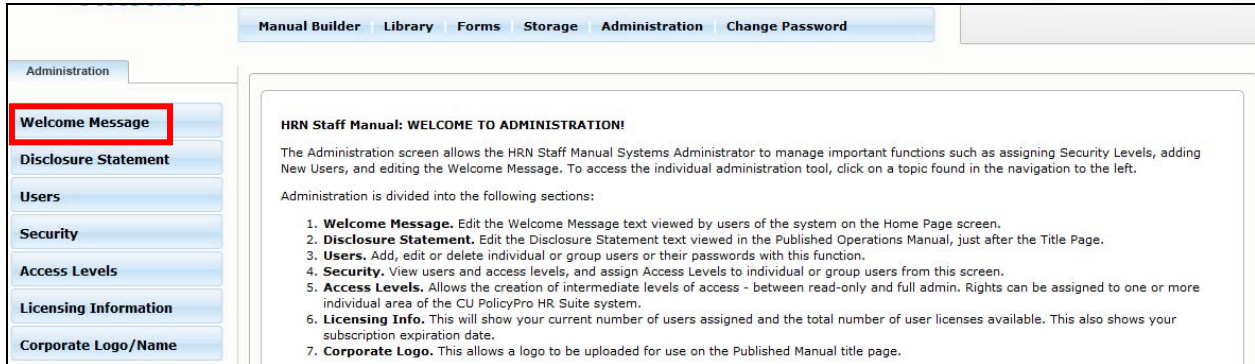


The Administration Area allows you to manage several functions, including the managing users, adding a Welcome Message to the Home Page, adding a disclosure to your published manual, uploading your logo, and viewing your license and subscription information.

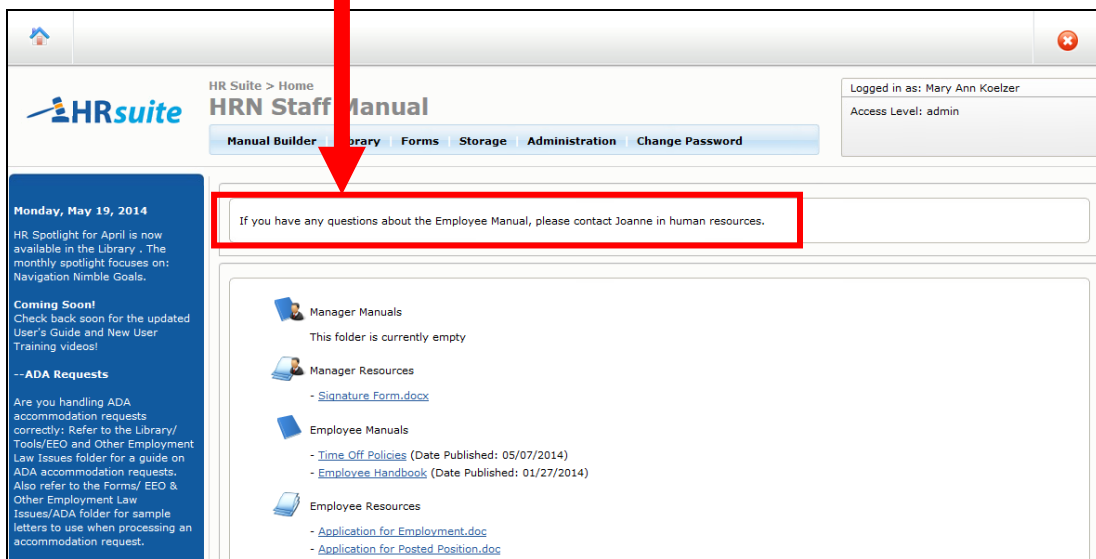
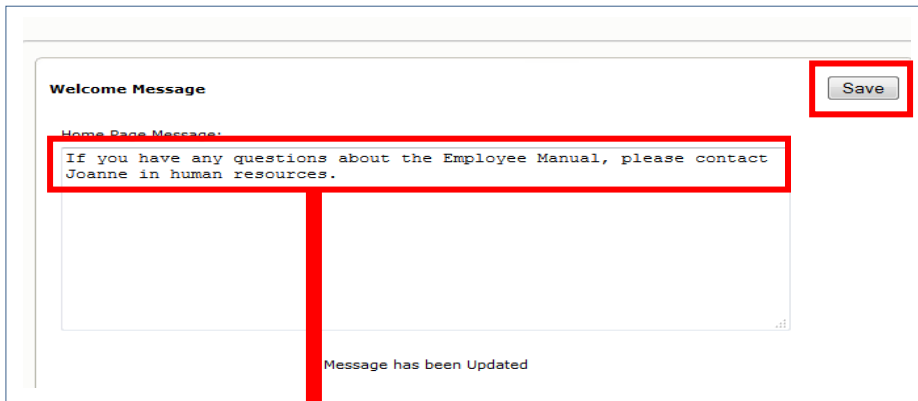


# Administration: Adding a Welcome Message to the Home Page

1. Click on the "Welcome Message" button on the left navigation.



2. Type in the "Welcome Message" field any message you want to appear on the Home Page. Click "Save" when done.

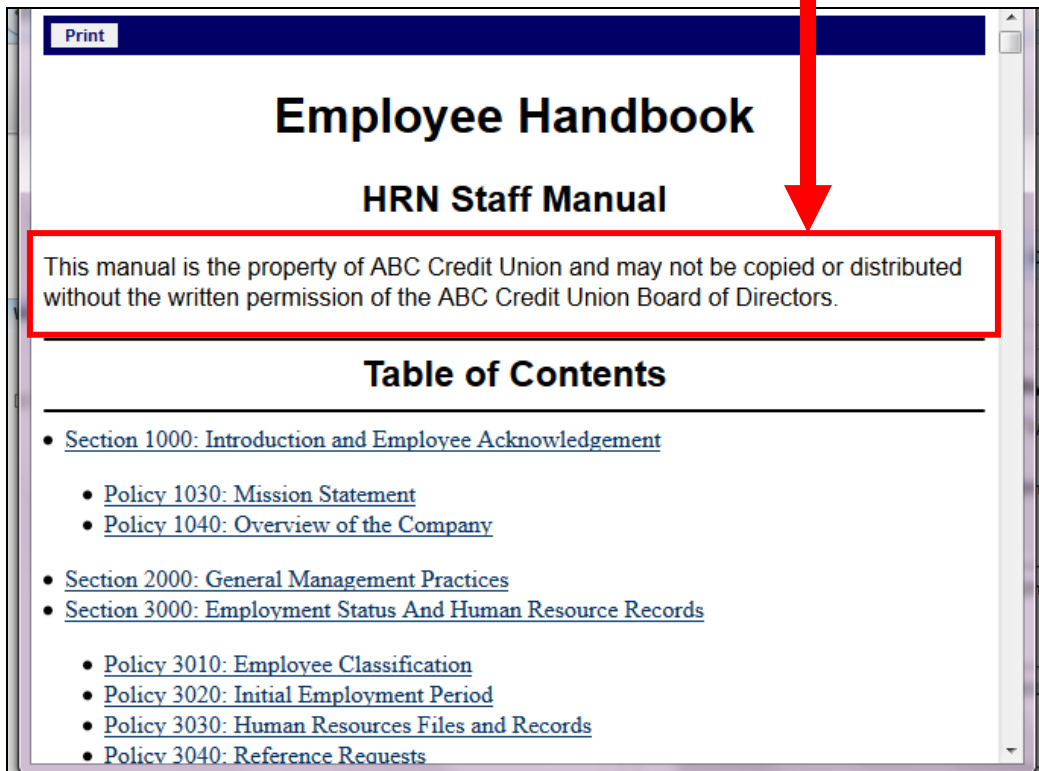


# Administration: Adding a Disclosure to the Published Manual

1. Click on the “Disclosure Statement” button on the left navigation.
2. Type in the “Disclosure Statement” field the Disclosure you want to appear on the Published Manual. Click “Save” when done.
3. This message will now appear in the Published Manual, on a separate page between the Title Page and the Table of Contents.

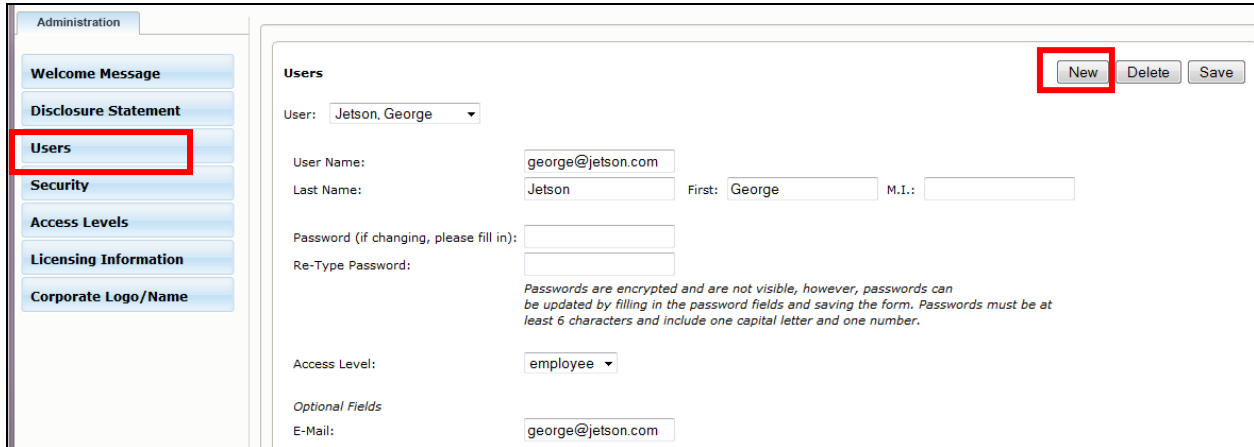
**Note:** Some organizations choose to use the “Additional text on Title Page” field to keep disclosure information on the Title Page. See page 37 for more information on publishing options and the “Additional text on Title Page” field.

The screenshot shows a web-based administration interface. On the left is a vertical navigation menu with buttons for 'Welcome Message', 'Disclosure Statement', 'Users', 'Security', 'Access Levels', 'Licensing Information', and 'Corporate Logo/Name'. The 'Disclosure Statement' button is highlighted with a red box. The main content area is titled 'Disclosure Statement' and contains a text input field with the text: 'This manual is the property of ABC Credit Union and may not be copied or distributed without the written permission of the ABC Credit Union Board of Directors.' A 'Save' button is located in the top right corner of the main area, also highlighted with a red box. A red arrow points from the text input field down to the next screenshot.



## Administration: Adding New Users

1. Click on the “Users” button on the left navigation.
2. A list of current users will appear. Click the “New” button on the far right side of the screen.

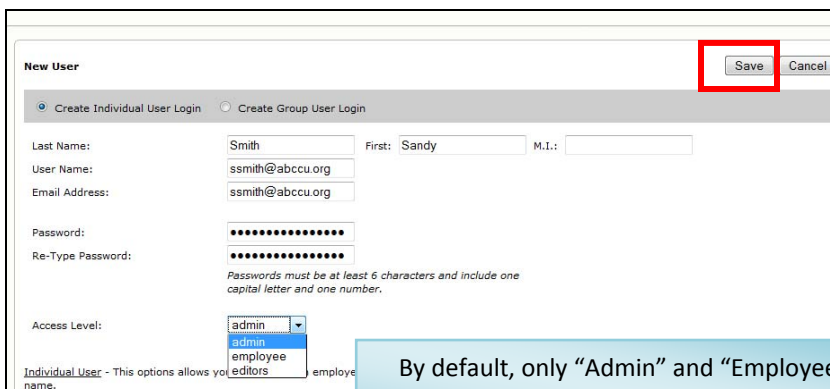


The screenshot shows the 'Administration' interface. On the left, a navigation menu includes 'Welcome Message', 'Disclosure Statement', 'Users', 'Security', 'Access Levels', 'Licensing Information', and 'Corporate Logo/Name'. The 'Users' button is highlighted with a red box. The main content area is titled 'Users' and shows a dropdown menu for 'User' set to 'Jetson, George'. At the top right of this area, there are three buttons: 'New', 'Delete', and 'Save'. The 'New' button is highlighted with a red box. Below the dropdown, there are input fields for 'User Name' (george@jetson.com), 'Last Name' (Jetson), 'First' (George), and 'M.I.'. There are also fields for 'Password' and 'Re-Type Password'. A note states: 'Passwords are encrypted and are not visible, however, passwords can be updated by filling in the password fields and saving the form. Passwords must be at least 6 characters and include one capital letter and one number.' An 'Access Level' dropdown is set to 'employee'. Under 'Optional Fields', the 'E-Mail' field is george@jetson.com.

3. The “New User” form will appear (see below).
4. Two types of users can be created: Individual or Group Users.

An Individual User is a distinct User Name and Password for a specific individual. A Group User is a User Name and Password that is shared among a group who all have the same access level (i.e. Board of Directors or Employees with read-only access). **Tip: An email address must be entered in order for the user to utilize the “Forgotten Password” function from the login screen. Group users will not have an email address option.**

5. For an Individual, type in the First and Last Name, the User Name, Email address, and Password. (Passwords are encrypted and must be entered in twice for security reasons). Group Users will have a Group Name (instead of First/Last) and will not have an option for email address.
6. From the dropdown list, choose the Access Level for this user.
7. When you’re finished, click the “Save” button.

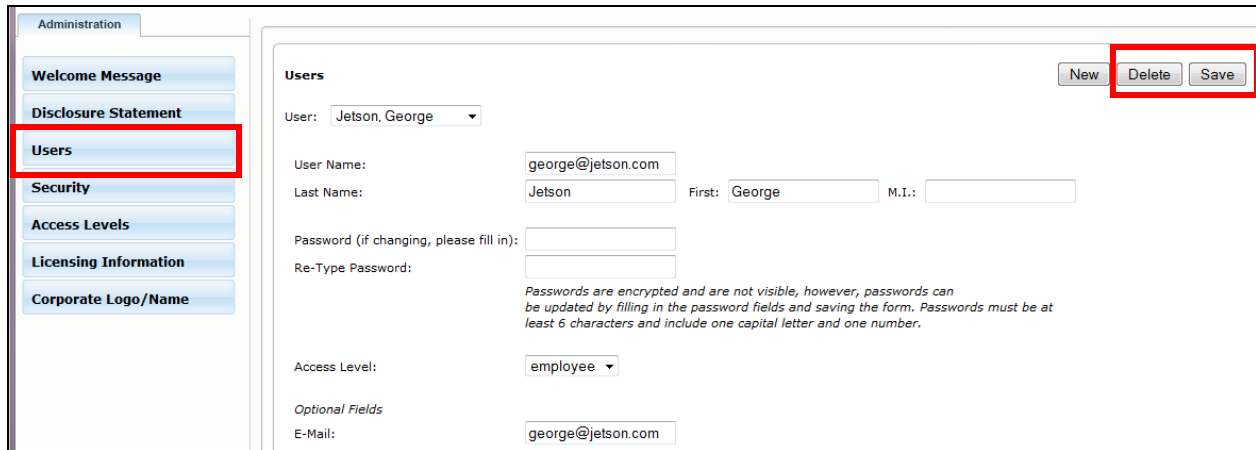


The screenshot shows the 'New User' form. At the top right, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red box. The form has two radio buttons: 'Create Individual User Login' (selected) and 'Create Group User Login'. Below are input fields for 'Last Name' (Smith), 'User Name' (ssmith@abccu.org), 'Email Address' (ssmith@abccu.org), 'First' (Sandy), and 'M.I.'. There are also fields for 'Password' and 'Re-Type Password'. A note states: 'Passwords must be at least 6 characters and include one capital letter and one number.' An 'Access Level' dropdown is set to 'admin'. Below the dropdown, there are options for 'admin', 'employee', and 'editors'. A note at the bottom left says: 'Individual User - This option allows you to enter the user's name.'

By default, only “Admin” and “Employee” access levels are available. To add additional access levels as seen here, see page 60.

## Administration: Editing or Deleting Users

1. Click on the “Users” button on the left navigation.
2. This will bring up the list of current users. Use the dropdown list to view individual user information.
3. For any user, you can update the user’s First or Last Name, User Name, Password or Access Level. After any changes are made, click the “Save” button.
4. To delete a user, click the “Delete” button. This will permanently delete this user.



The screenshot shows the Administration interface. On the left is a navigation menu with buttons for Welcome Message, Disclosure Statement, Users, Security, Access Levels, Licensing Information, and Corporate Logo/Name. The 'Users' button is highlighted with a red box. The main content area is titled 'Users' and shows a dropdown menu for 'User: Jetson, George'. Below this are input fields for 'User Name: george@jetson.com', 'Last Name: Jetson', 'First: George', and 'M.I.'. There are also fields for 'Password (if changing, please fill in):' and 'Re-Type Password:'. A note states: 'Passwords are encrypted and are not visible, however, passwords can be updated by filling in the password fields and saving the form. Passwords must be at least 6 characters and include one capital letter and one number.' The 'Access Level:' is set to 'employee'. At the bottom, there is an 'Optional Fields' section with 'E-Mail: george@jetson.com'. In the top right corner, there are three buttons: 'New', 'Delete', and 'Save'. The 'Delete' and 'Save' buttons are highlighted with a red box.

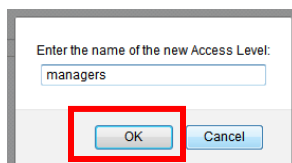
## Administration: Creating Additional User Access Levels

By default, there are only two access levels: Admin and Employee.

Admin level access gives the user full access to perform any function in the system. Admin is the only level of access that allows a user to access the Administration area. Employee level access is read-only. A user with Employee access can login and will only see items posted in the “Employee Manuals” and “Employee Resources” folders on the Home Page. No navigation (other than Change Password) will be available to an Employee level user.

You may find it useful to have access levels between Admin and Employee. Follow the steps below to create and define custom levels of access.

1. Click on the “Access Levels” button on the left navigation.
2. Click “New” to create a new access level. You will be asked to name the access level. Name the access level then click “OK”.



The screenshot shows a dialog box titled 'Enter the name of the new Access Level:'. It contains a text input field with the word 'managers' entered. Below the input field are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red box.

## Administration: Creating Additional User Access Levels (continued)

3. A blank “Access Levels” form will appear. Use the checkboxes to determine what areas this access level can access.



**Access Levels** New Rename Delete Save

Access Level:

HR Suite

- Manual Builder
- Forms
- Library
- Storage
- Manager Resources

- **Manual Builder** allows this user to access the Manual Builder area, and the user will have full rights to edit the Working Manual, including publishing, archiving, etc.
- **Library** allows the user to access the resources found in the Library.
- **Forms** allows the user access to the forms found in the Forms area.
- **Storage** allows the user full access to the Storage area, including uploading files and posting them to the “Employee Resources” and “Managers Resources” folders.
- **Manager Resources** will allow this user to see the documents posted in the “Manager Resources” folder, as well as manuals posted to the “Manager Manuals” folder.

**Note: If all options are checked, this user can do everything except go into the ADMINISTRATION area.**

4. Once your options are selected for this user level, click “Save”.
5. You can also delete or rename existing access levels, using the buttons on the far right of the screen.

## Administration: Viewing/Editing Multiple Users at Once

1. Use the “Security” tab to quickly view all user levels and user IDs, and to quickly change the user access level for multiple users at one time.
2. Click on the “Security” button on the left navigation.
3. Clicking on the various access levels will show all users with that level of access in the left side box. All users with any other level of access will appear on the right side.



4. Click on a user and use the “<Add>” or “Remove>” buttons to move users in or out of any access level. This can also be done by individual user in the Users tab.



**Tip:** You will not see your own User Name. This prevents you from inadvertently removing yourself as an admin.

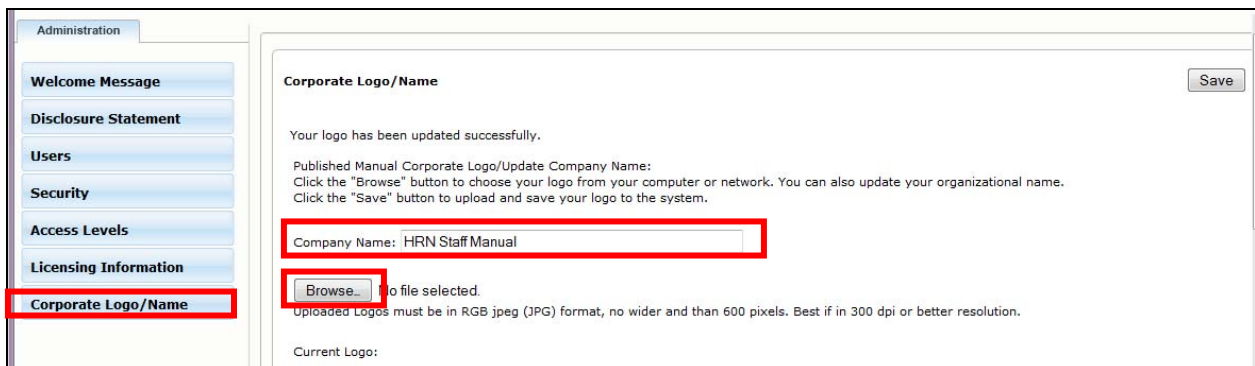
## Administration: Viewing License and Subscription Information

1. To view your license and subscription information, click on the “Licensing Information ” button on the left navigation.
2. This will display the number of users you currently have set up, and the total number available. By default, each organization receives 50 user licenses.
3. This will also display your subscription expiration date.



## Administration: Updating Corporate Logo and Organization Name

1. A logo can be uploaded in the Administration area to be used on the title page of any published manual.
2. Click on the “Corporate Logo/Name” button on the left navigation.
3. Use the “Browse” button to upload your logo. Your current logo will show below the “Browse” field.  
**Note:** Depending on the internet browser you are using, this button may be titled something other than “Browse.”
4. To replace a current logo, simply use the “Browse” button to upload the updated logo, which will replace any logo currently in the system.



# Appendix A – Printing Tips

## Printing Tip #1: Header and Footer

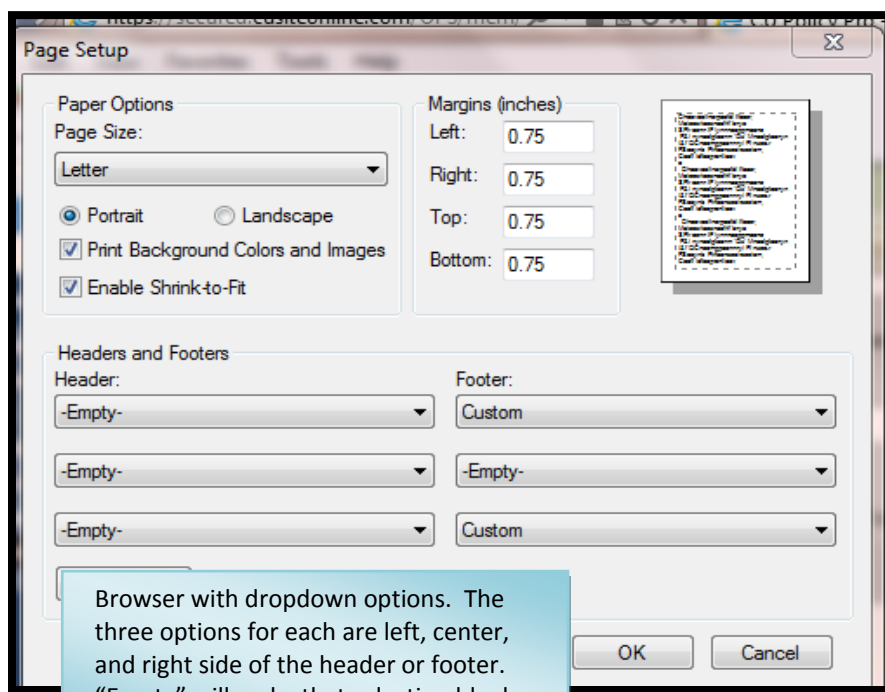
Because this is an HTML document printing from a Web site, your Internet Page Set Up options will apply when you print the manual. Many Internet Page Set Up options call for the URL to print on the header and/or the footer of the page, which can make the page look cluttered and unprofessional.

To suppress the URL, go to the “File” menu on your Internet Browser navigation bar, and choose “Page Set Up”.

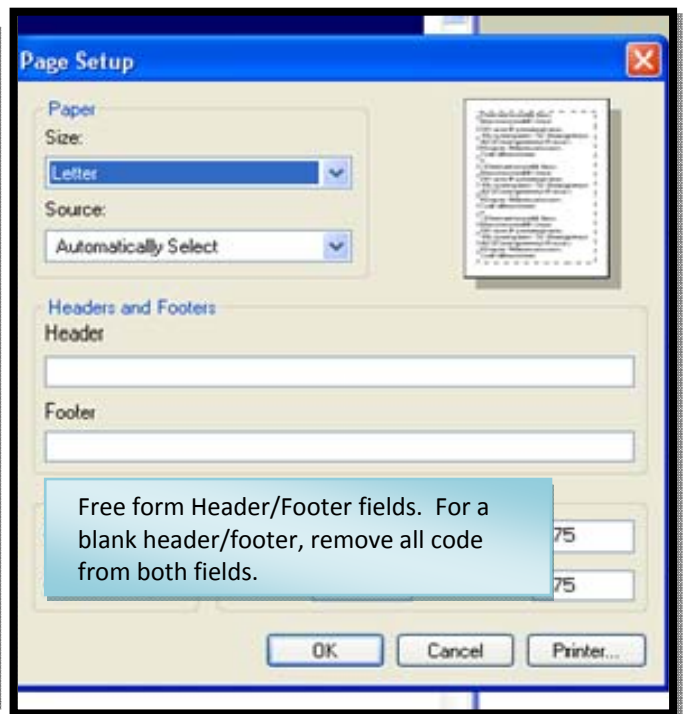
A pop up box will open with the Page Set Up options. The Page Set up options pop up may look different depending on your Internet Browser version. Two examples are below.

The Header and Footer options allow you to choose what shows in the Header or Footer of your printed documents. Many organizations choose to remove all header and footer codes.

Depending on your browser, this may be a dropdown box selection, or you may have to delete code from the Header and Footer fields.



Browser with dropdown options. The three options for each are left, center, and right side of the header or footer. “Empty” will make that selection blank.



Free form Header/Footer fields. For a blank header/footer, remove all code from both fields.

If your browser provides dropdown selections, you can choose from the dropdowns to add in page numbers, date, or other options. If your browser only provides Header/Footer fields, Appendix B includes the code text that can be entered to customize your header and footer.

**Note:** These settings will apply to all documents printed off the internet from your computer. You may want to copy the current header and footer settings to a Word document so you can add them back in later. You may not want the URL to print on your manual, but you might want it for printing from other web sites.

Also, these settings apply to a particular computer. A user printing the policies from another computer may also have to adjust their settings.



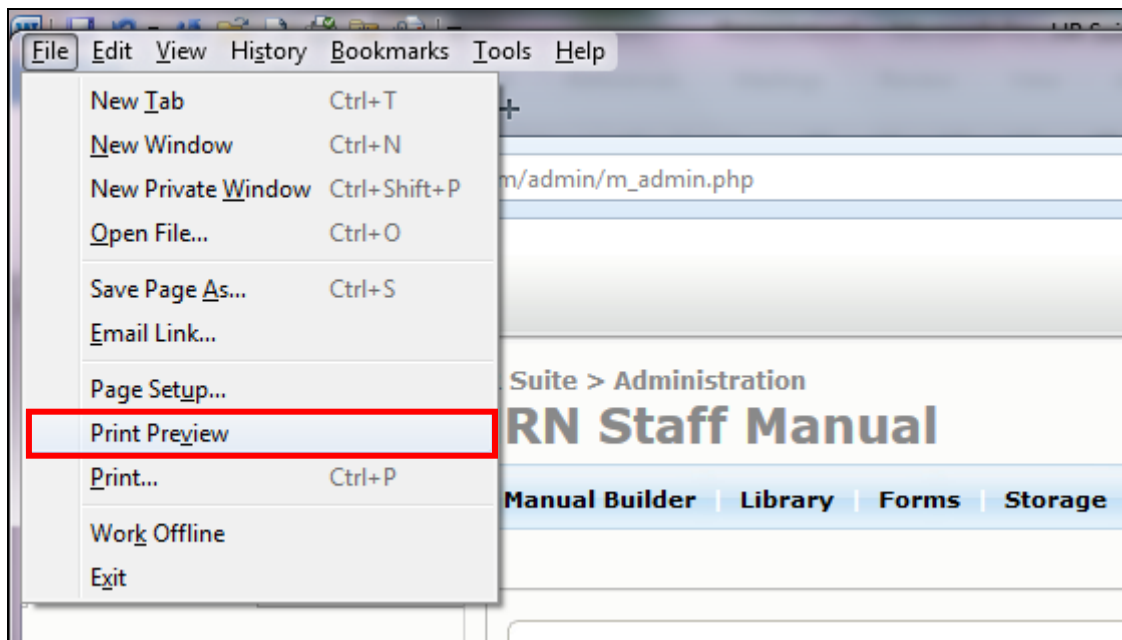
## ***Tip #2: True Print Preview***

The “Preview” mode of either a single policy or the published manual opens an HTML document, and will show all text, date field information and Key Field code replacement for the policy. However, page margins, page breaks, paragraph breaks, accurate sizing for tables and columns, and headers and footers will not be shown in preview mode.

To view an accurate representation of what the policy/published manual will look like when printed, follow these steps:

1. Open the policy or published manual in “Preview” mode.
2. From the File Navigation menu, choose “File”, then “Print Preview”.

For larger published manuals, the print preview may take a few minutes to load.



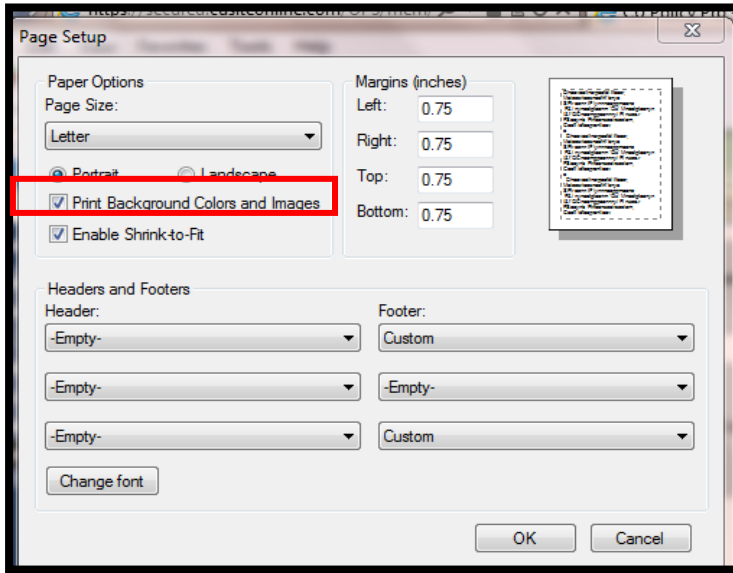
### Tip #3: Printing Background Highlighting

If background highlighting has been applied to policy text, but is not printing, there is a browser setting that must be changed.

Depending on your browser, this setting may be found in different places. Below are two browser examples of where to find the setting and how to change it.

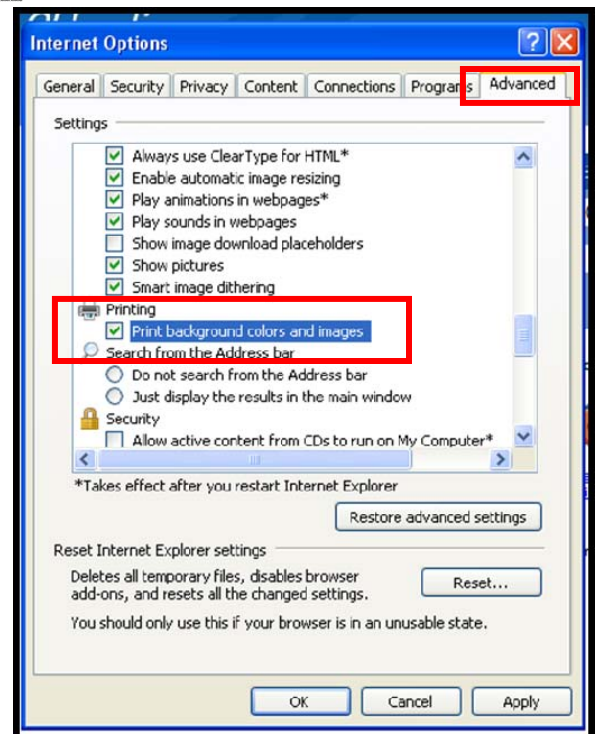
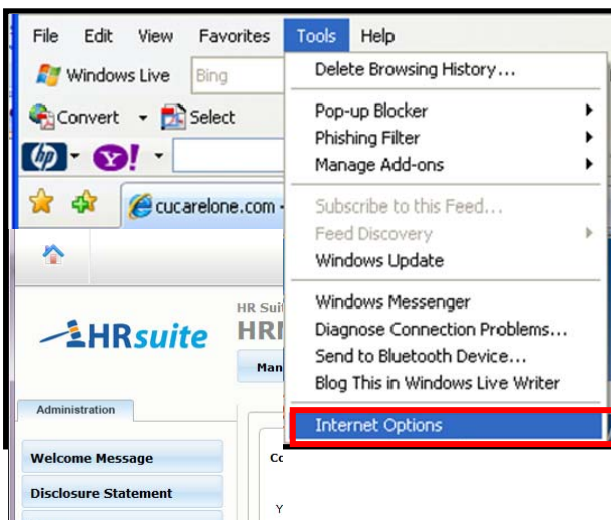
Try this first:

1. Go to **FILE > PAGE SET UP**.
2. The setting is the **“Print Background Colors and Images”** setting.
3. This must be checked, otherwise background highlighting will not print.



If the **“Print Background Colors and Images”** setting is not under **FILE > PAGE SET UP**, try this:

1. In Internet Explorer, go to **TOOLS > INTERNET OPTIONS**.
2. Go to the **ADVANCED** tab.
3. Find the **PRINTING** options.
4. Make sure **“Print background colors and images”** option is checked.



## Appendix B – Header and Footer Codes for Printing

Code	Description of what will print	Example of what will print
&w	Window title.	Published Manual: ABC CU
&u	Page address (URL).	<a href="https://securesite.cusiteonline.com/PS/?theid=951">https://securesite.cusiteonline.com/PS/?theid=951</a>
&d	Date in short format specified by Regional Settings.	8/26/2009
&D	Date in long format specified by Regional Settings.	Wednesday, August 26, 2009
&p	Current page number.	1
&P	Total number of pages.	87
&&	A single ampersand: &.	&
&b	Separates preceding and following text into different sections (one instance will center, two will right justify)	See examples below - this would be used in combination with other text
	Nothing - removes IE header and / or footer completely.	
Add your own text	Will print the text you typed in	ABC CU Policy Manual

Code Combination Ideas	Description of what will print	Example of what will print
Page &p of &P	Current page number and total pages in document	Page 1 of 22
Page &p	Current Page number	Page 1
Your Own Text &b &b Page &p of &P	Your text left justified, page numbers right justified	ABC CU Manual                      Page 1 of 22
&b Page &p of P	Current page number and total pages in document (centered)	Page 1 of 22