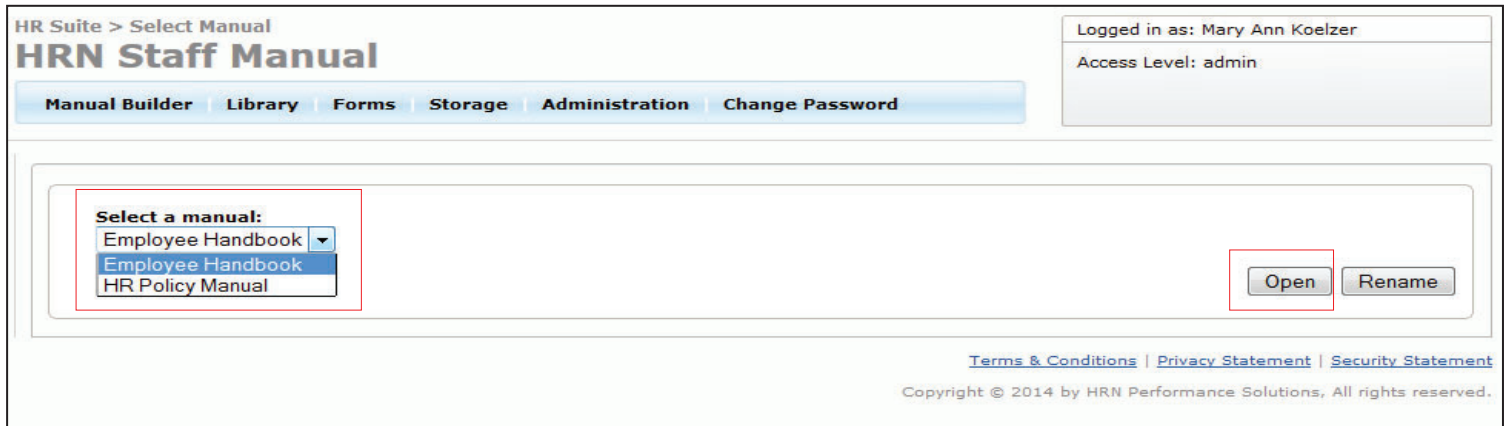


# Working with Policies: Accessing Manual Builder

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.

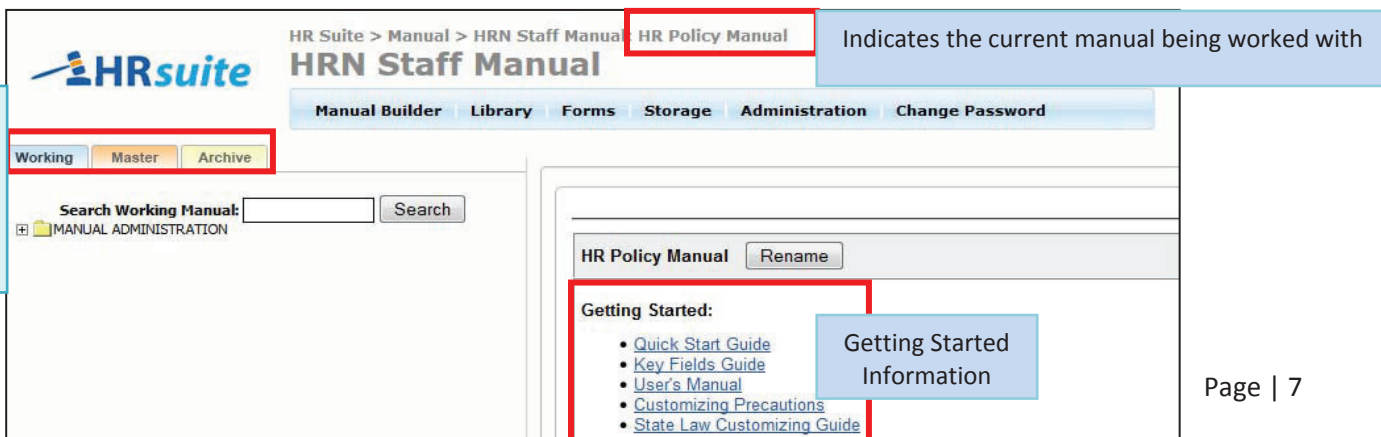


Existing manuals will appear in the “Select a Manual” dropdown box. Click the dropdown arrow and select a manual. Click “Open”.



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

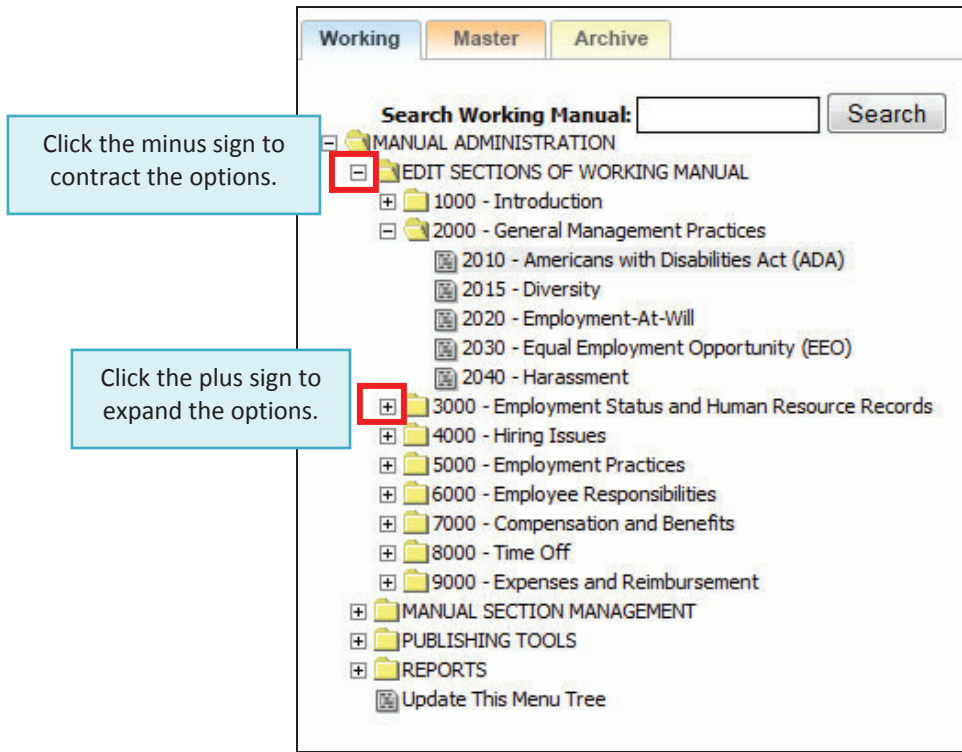
- The **Working Manual** is used to maintain and customize the policies for your organization. The Working Manual contains the top level chapter folders, but does not contain any policies unless they have been added. Model policies can be added to the Working Manual from the Master Manual, or unique 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

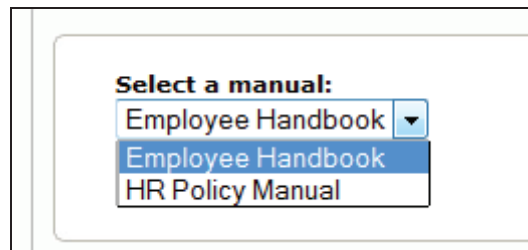
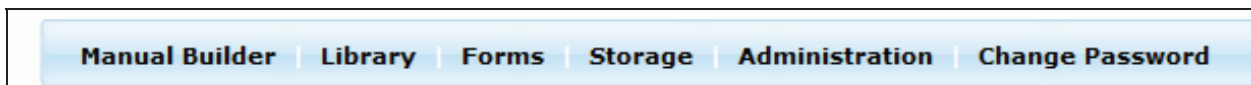
Whether you are in the Working Manual, Master Manual or Archive, the navigation will be along the left side of the screen, starting with a folder titled “MANUAL ADMINISTRATION”. Additional folders of navigation are contained within the “MANUAL ADMINISTRATION” folder.

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.

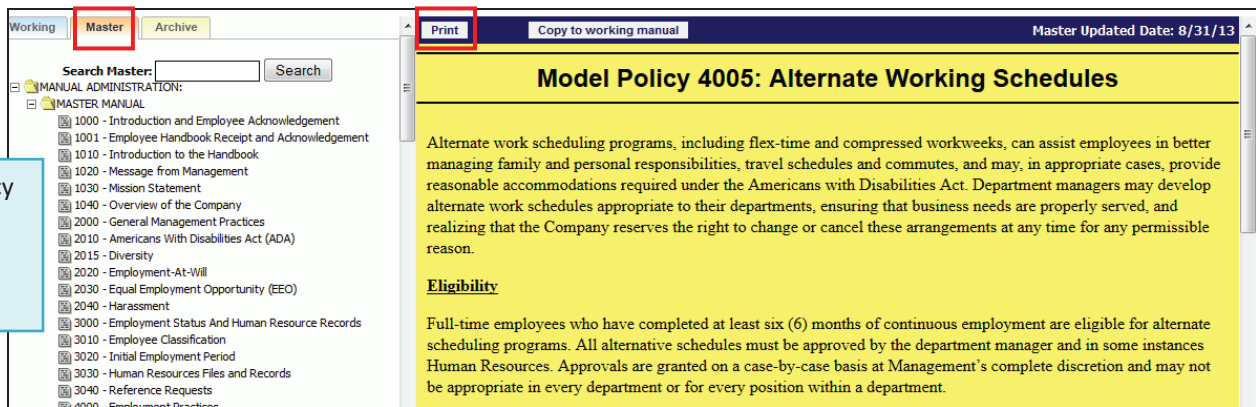


To switch between the Employee Handbook and the HR Manual, click the “Manual Builder” link on the top navigation, then select a manual from the dropdown list.



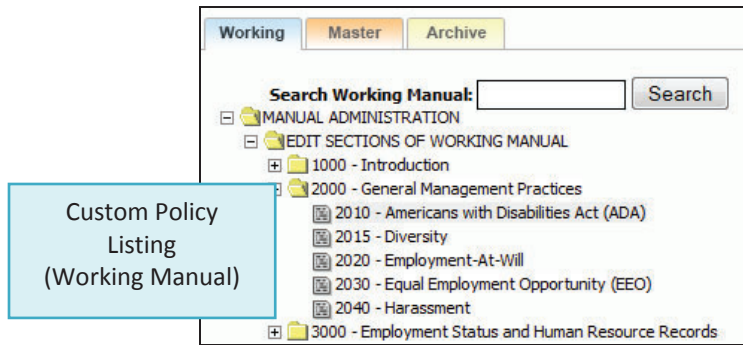
# Working with Policies: Viewing & Printing Model Policies

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.

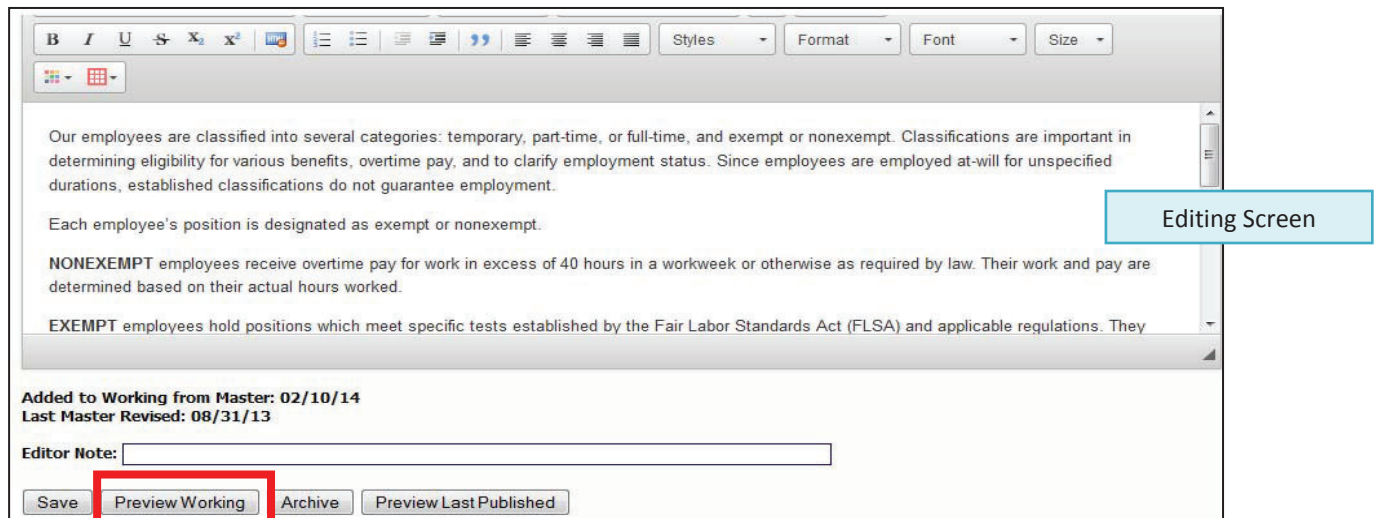


## Working with Policies: Viewing & Printing Custom Policies

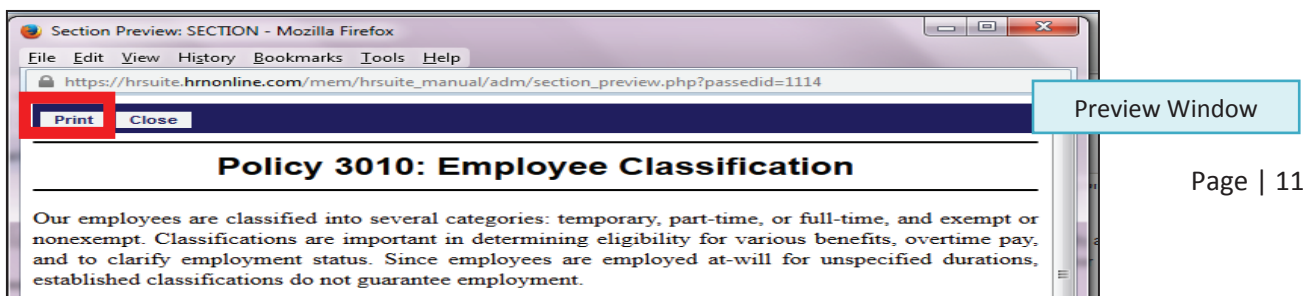
1. Click on the “Working” tab at the top left of the screen to make sure you are in the Working Manual.
2. Using the plus signs to the left of each folder, expand the “MANUAL ADMINISTRATION” and the “EDIT SECTIONS OF WORKING MANUAL” folders. The top level chapter topics will display. Each chapter page 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 shows a web interface with three tabs at the top: "Working", "Master", and "Archive". The "Working" tab is active. On the left, there is a "Search Working Manual:" field with a "Search" button. Below it is a tree view of folders: "MANUAL ADMINISTRATION", "EDIT SECTIONS OF WORKING MANUAL", "MANUAL SECTION MANAGEMENT" (highlighted with a red box), "PUBLISHING TOOLS", and "REPORTS". Under "MANUAL SECTION MANAGEMENT", several sub-items are listed, including "Multi-Add to Working From Master Utility" (highlighted with a red box). The main content area is titled "Multi-Add to Working From Master Utility" and contains the instruction: "Check the sections below and click the 'Add to Working from Master' button". Below this is a "Select/Deselect All Sections" button and a list of model policies, each with a checkbox:

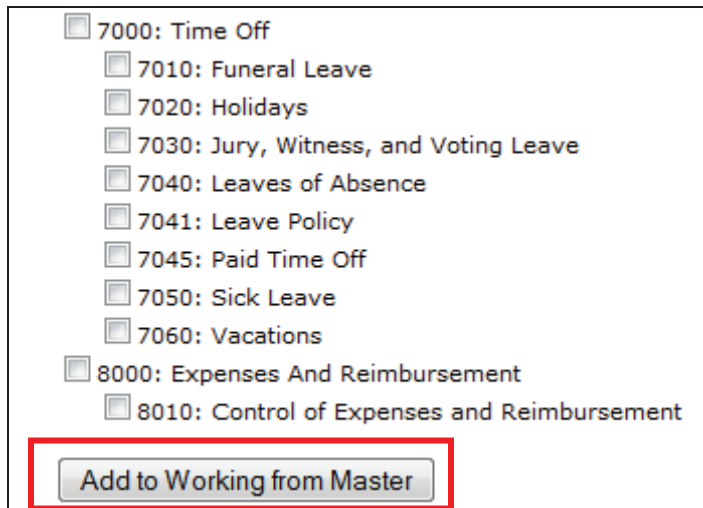
- 1000: Introduction and Employee Acknowledgement
  - 1001: Employee Handbook Receipt and Acknowledgement
  - 1010: Introduction to the Handbook
  - 1020: Message from Management
  - 1030: Mission Statement
  - 1040: Overview of the Company
- 2000: General Management Practices
  - 2010: Americans With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

A callout box on the right side of the list contains the text: "Model Policy Listing – click the checkbox next to each policy you want included in your Working Manual."



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

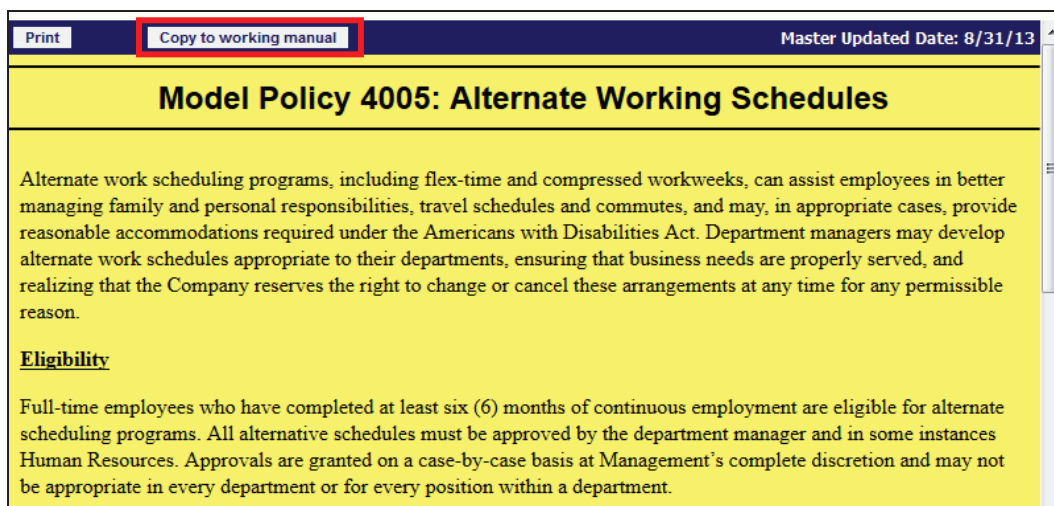
5. Scroll to the end of the page and click the “Add to Working from Master” button. The current model policy version from the Master Manual for each selected policy will be added to your Working Manual.



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.



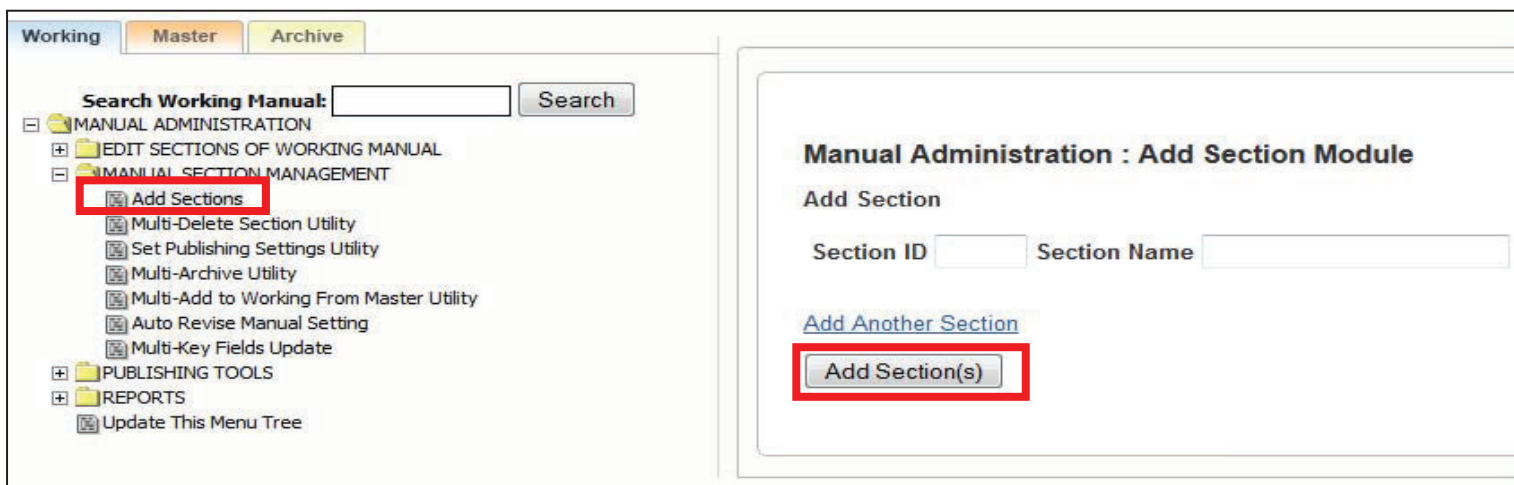
A screenshot of a web page displaying a model policy. At the top, there is a dark blue header bar with three elements: a "Print" button, a "Copy to working manual" button (highlighted with a red border), and the text "Master Updated Date: 8/31/13". Below the header, the main content area has a yellow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