

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.

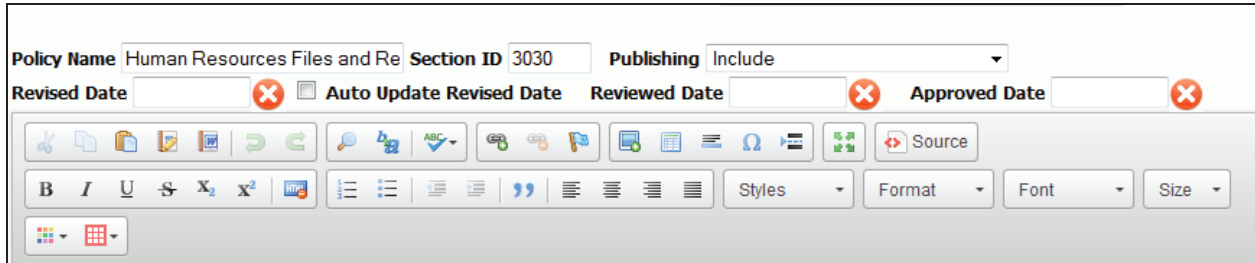
Below the content area are editor notes, date information specific to the policy, and action buttons to save, preview, or archive the content. **Note:** If your policy has not yet been published, the “Preview Last Published” action button will not be available.

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

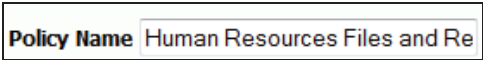
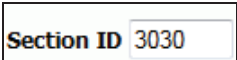

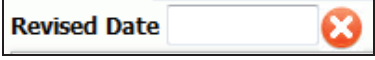


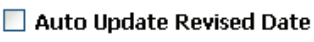
The screenshot displays a web-based policy editor interface. At the top, there is a header section with the following fields: **Policy Name** (Human Resources Files and Re), **Section ID** (3030), and **Publishing** (Include). Below this are **Revised Date** and **Approved Date** fields, each with a red 'X' icon, and an **Auto Update Revised Date** checkbox. A callout box labeled "The Toolbar" points to the top-right area of the header. The main editing area contains a rich text editor toolbar with various icons for text formatting (bold, italic, underline, strikethrough, subscript, superscript, link, unlink, bulleted list, numbered list, indent, outdent, quote, unquote, link, unlink, source), a **Styles** dropdown, a **Format** dropdown, a **Font** dropdown, and a **Size** dropdown. A callout box labeled "The Content Area" points to the main text area. The text in the content area is as follows: **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: A callout box labeled "Date Information" points to the section below the content area. The "Date Information" section displays: **Added to Working from Master: 02/10/14**
Last Master Revised: 01/01/11 A callout box labeled "Editor Notes" points to the **Editor Note:** text input field. At the bottom of the interface, there are four buttons: **Save**, **Preview Working**, **Archive**, and **Preview Last Published**. A callout box points to the **Preview Last Published** button.

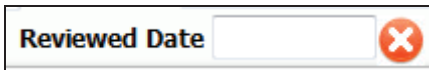
Editing Policies: The Toolbar

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.




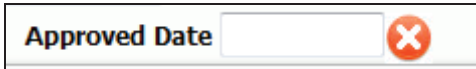
The following section outlines the functions of each item in the Toolbar. Hovering your mouse over each toolbar icon will bring up a label with information about the tool.

Icon	Function
	<p>Policy Name. The title of the Policy. This can be updated at any time.</p>
	<p>Section ID. 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>Publishing Setting. 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>Revised Date. 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>Auto Update Revised Date. 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.



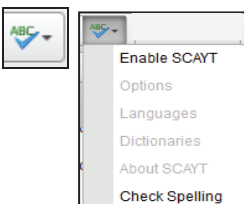
Undo and Redo. These are standard icons which allow users to “undo” or “redo” multiple steps.










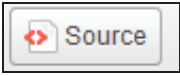



Find. This allows you to search the current policy for specific text.




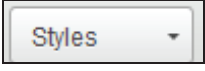
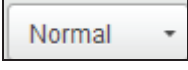





Replace. This allows you to search the current policy for specific text and replace it with new text.



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>Add Link, Remove Link and Anchor. These icons are generally used for editing web content, and are not typically used when editing policies in HR Suite.</p>
	<p>Insert/Edit Graphics. This icon inserts a graphic image into the content. Images are not typically inserted into HR Suite policies.</p>
	<p>Insert/Edit Table. Inserts a table into a policy or allows editing of an existing table. See page 25 for more information on Tables.</p>
	<p>Horizontal Line. Places a horizontal line across the screen.</p>
	<p>Special Character. Allows the placement of special characters within the text.</p>
	<p>Page Break. Allows the user to manually insert a page break when this page is printed (single policy print or published manual print).</p>
	<p>Maximize Editor. 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>Source. 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>Bold, Italic, Underline, Strikethrough, Subscript and Superscript. Common editing items to format text.</p>
	<p>Remove Formatting. Removes all formatting from any highlighted text</p>
	<p>Numbering and Bullets. Standard icons used to apply numbering and bullet formats. See page 21 for more information on applying these styles.</p>

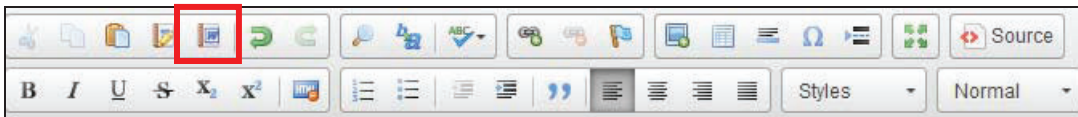
Icon	Function
	<p>Increase and Decrease Indentation. Allows blocks of text to be indented to the right (or moved back to the left). Often used in conjunction with bullets and numbering formatting.</p>
	<p>Block Quote. Creates indentation to the left and right of a block of text. Often used to offset text within a document.</p>
	<p>Left, Right Center and Block Justify. Standard formatting tools used to align paragraphs of text.</p>
	<p>Formatting Styles. 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>Paragraph Styles. 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>Font Style and Font Size. 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>Text Color. Allows color changes to highlighted text. Click the dropdown arrow to see the color choices.</p>
	<p>Background Highlighting. Highlights behind text. Click the dropdown arrow to see the color choices.</p>

Editing Policies: Adding and Editing Text

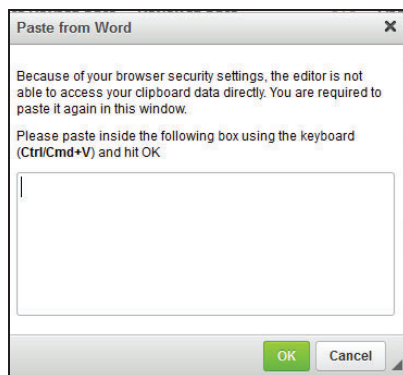
To edit existing text, simply place your cursor within the text and begin typing, deleting, or using the formatting tools in the Toolbar.

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:

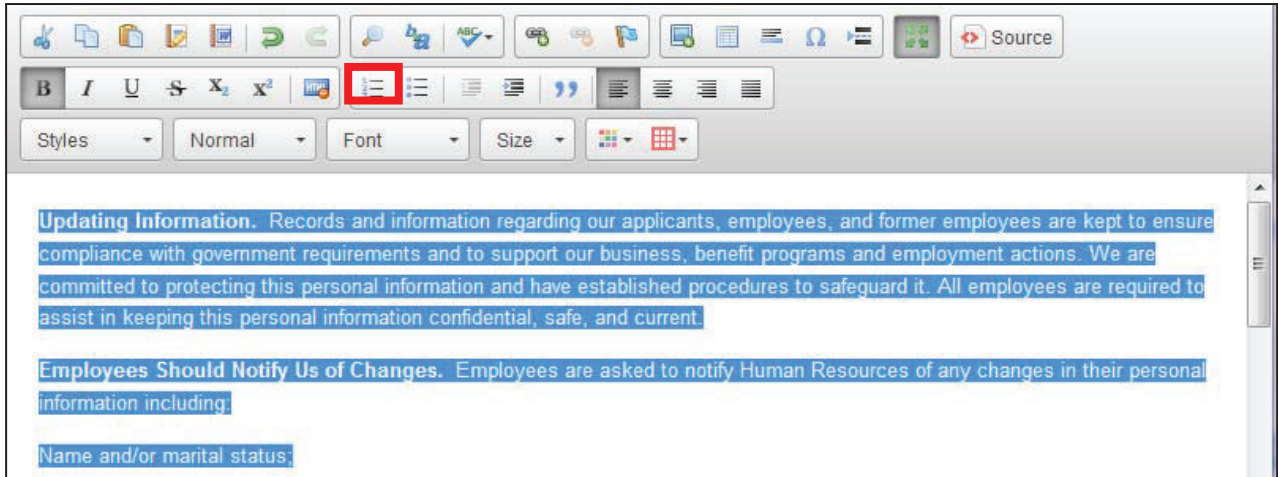
- **Bullets and numbering.** The system may bring in the bullets/numbering as text. The bullet or numbering style will need to be reapplied, and the added text bullets or numbers will need to be removed.
- **Columns.** If columns were set up in Word, the column structure may not be retained. Tables may 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

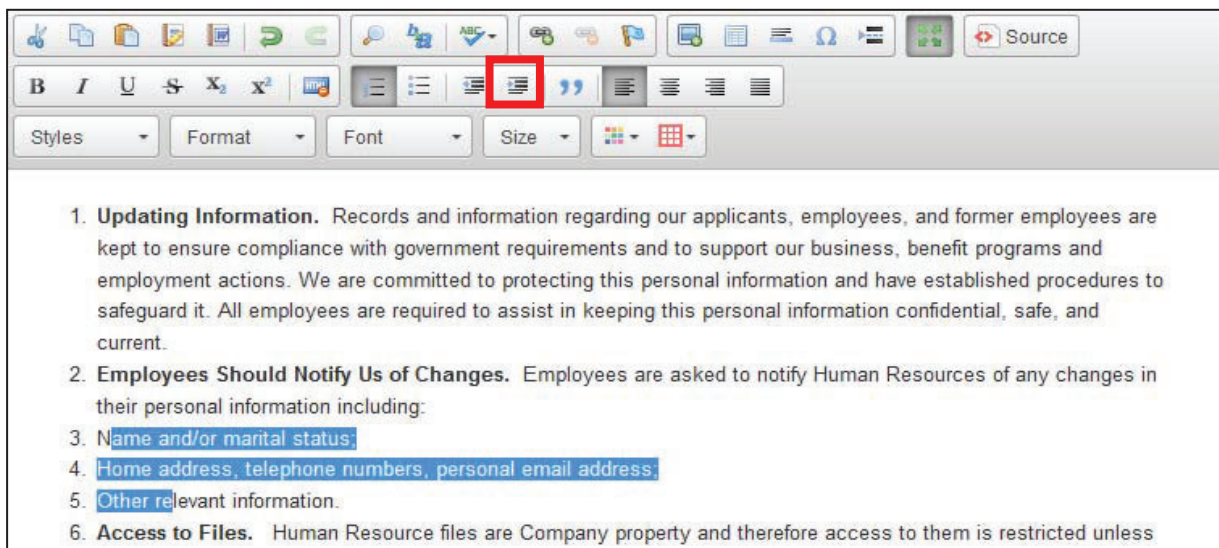
1. To use the numbering function, highlight the text to be put into a list and click the numbering icon.



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.

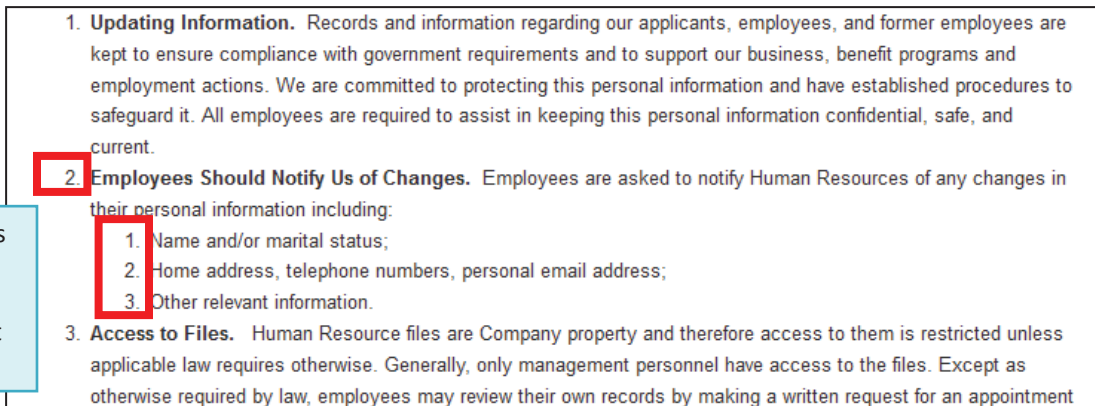
Tip: When highlighting, only a portion of the text in the last line needs to be highlighted. If the entire last line of text is highlighted and the block indentation is not working, try highlighting only a portion of the last sentence.



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.



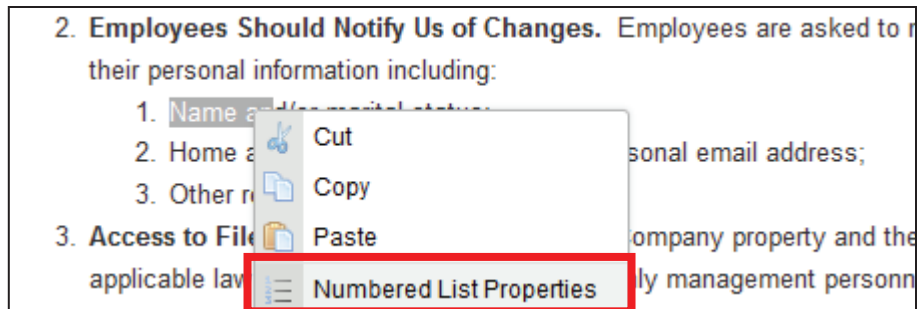
1. **Updating Information.** Records and information regarding our applicants, employees, and former employees are kept to ensure compliance with government requirements and to support our business, benefit programs and employment actions. We are committed to protecting this personal information and 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”.

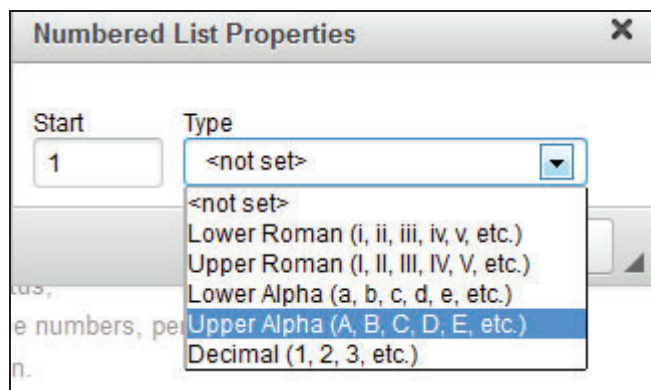


2. **Employees Should Notify Us of Changes.** Employees are asked to notify Human Resources of any changes in their personal information including:

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.  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:

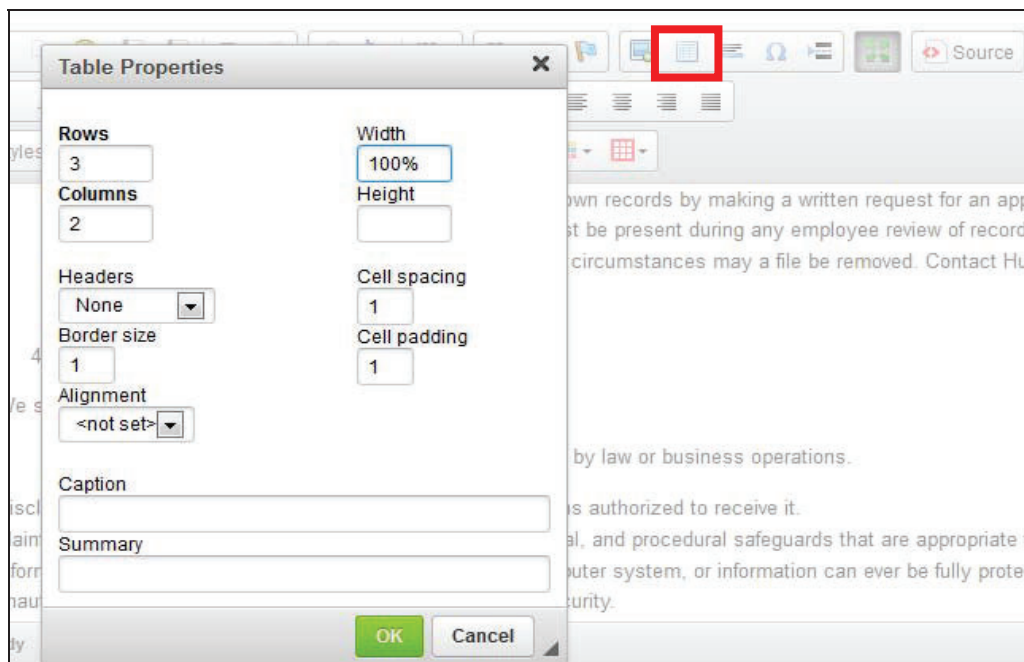
Rows: The number of rows for your table.

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”.

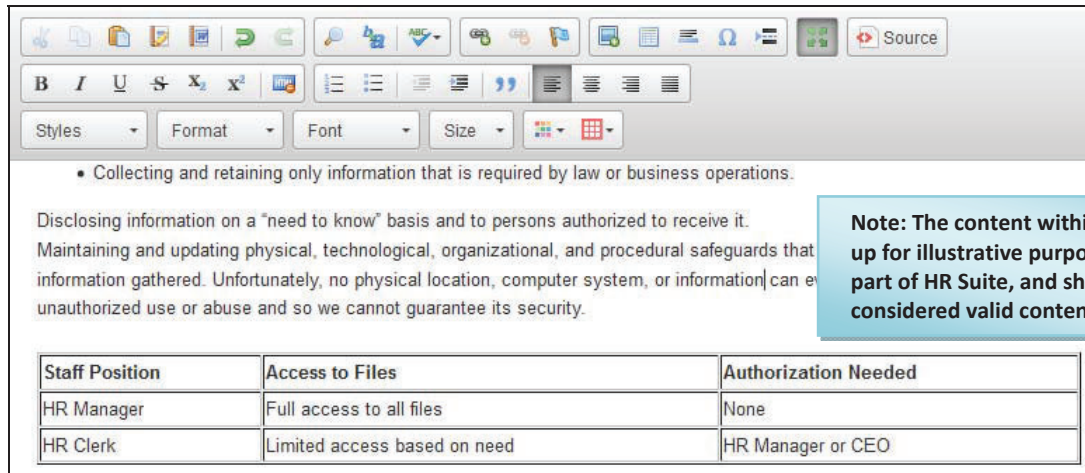
Width: The width of the entire table. While the default is 500 pixels, we recommend changing this to a percentage. Choose a number (usually between 50-100) and include the percentage sign.



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.

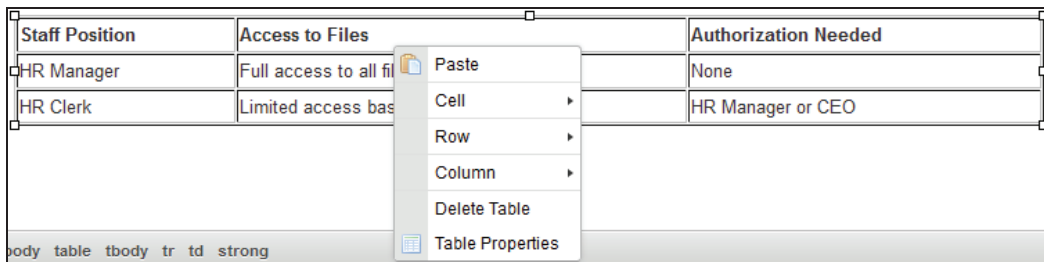
Staff Position	Access to Files	Authorization Needed
HR Manager	Full access to all files	None
HR Clerk	Limited access based on need	HR Manager or CEO

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

- 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).