

## 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)'. Three callout boxes with red arrows point to the table: 'Link to Key Field Database' points to the first column, 'Current Key Field Content. If the content is the Key Field number, the Key Field has not yet been defined.' points to the second column, and 'Description of what the Key Field will be defining.' points to the third 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.

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 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.hrsonline.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.

Working Manual Administration

MANUAL ADMINISTRATION

EDIT SECTIONS OF WORKING MANUAL

MANUAL SECTION MANAGEMENT

Add Sections

Multi-Delete Section Utility

Set Publishing Settings Utility

Multi-Archive Utility

Multi-Add to Working From Master Utility

Auto Revise Manual Setting

Multi-Key Fields Update

PUBLISHING TOOLS

REPORTS

Update This Menu Tree

Multi-Key Fields Update

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]

Define Key Fields in the "Current Value" column.

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.

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]

Update