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: Added custom information on Accessing Staff files

[Save] [Preview Working] [Archive] [Preview Last Published]

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.

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HR Manager	Full access to all files	None
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Added to Working from Master: 02/10/14
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Editor Note:

[Save] [Preview Working] [Archive] [Preview Last Published]

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.

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 polices 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

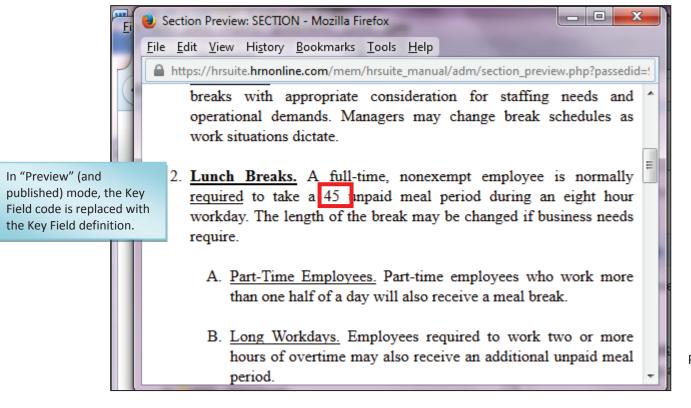| Key Field	Contents	Description
[[7040-1]]	two	Insert the number of authorized rest breaks for full-time, non-exempt employees (typically 2 per eight-hour shift).
[[7040-2]]	[7040-2]	Insert time period for lunch breaks for full-time, non-exempt employees (typically 30 to 60 minutes).
[[7040-3]]	[7040-3]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

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).

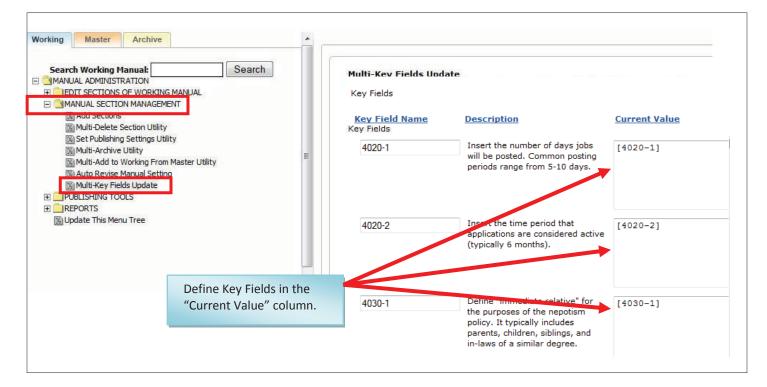## *Define Key Fields at the Individual Policy Level (Continued)*

7. 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.**

8. 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.

9. 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.

Text in the policy remains a piece of code.

"Contents" updates in the Key Fields area.

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.

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.