

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.

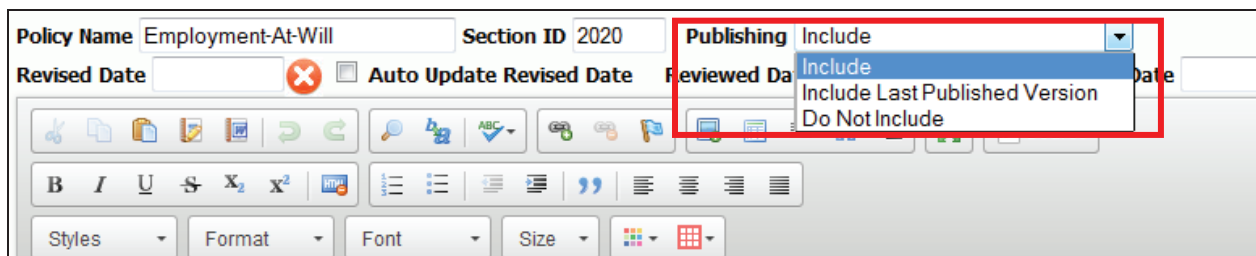
If the “Publishing” Setting is set to “Include” on a **specific policy**, the policy will be **included** in subsequent published manuals. If the “Publishing” Setting is set to “Do Not Include” on a **specific policy**, the policy will be **excluded** from any subsequent published versions. If the “Publishing” 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.



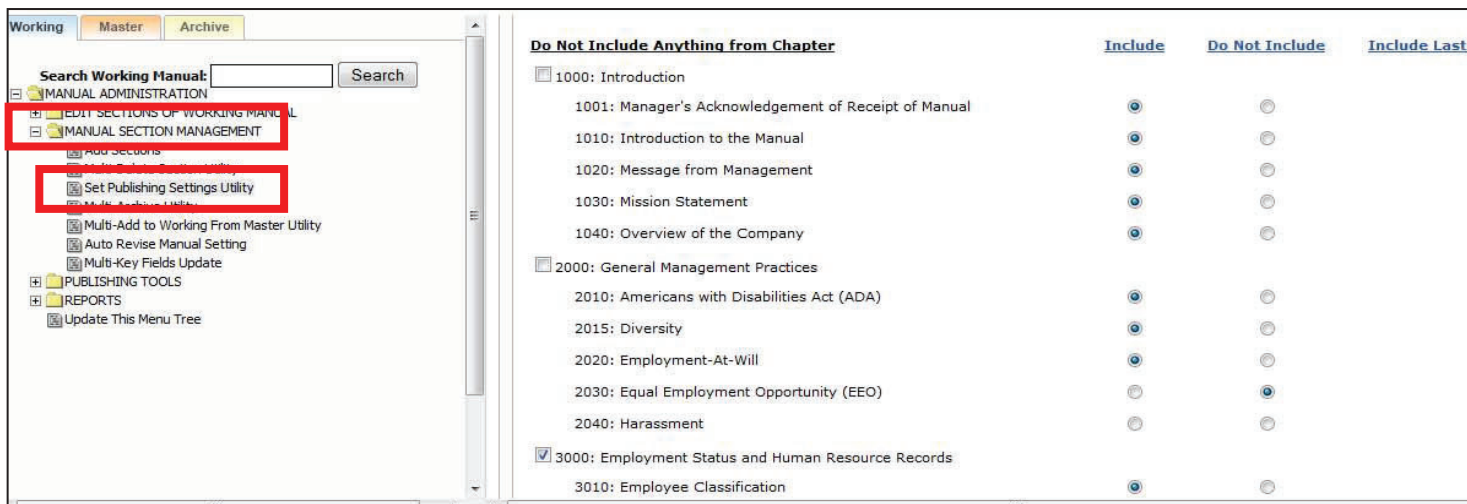
Setting the Publishing Setting for Multiple Policies and/or Chapter Pages

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.

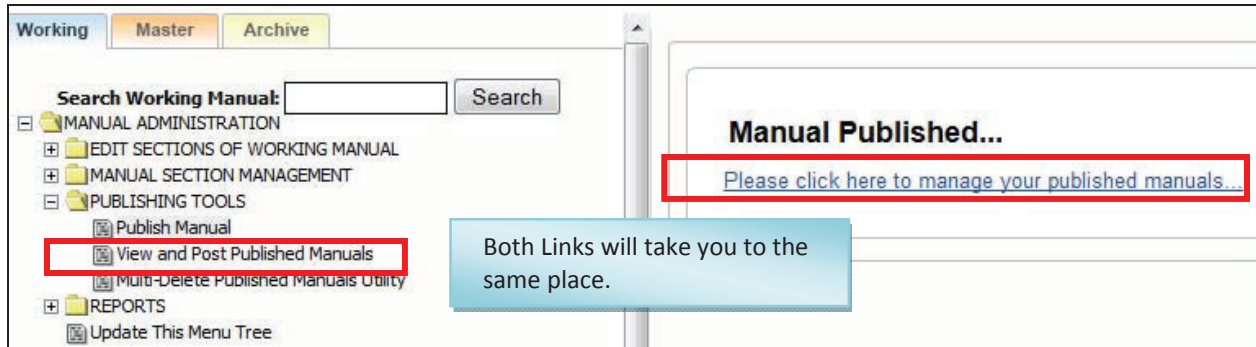
Select the Chapter Pages to Suppress in Publishing: This setting allows any or all Chapter page content included in the publish to be excluded from the document. This is not the same thing as “Do Not Include”. A top level Chapter page *must* be included in the publish in order for any policies within 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

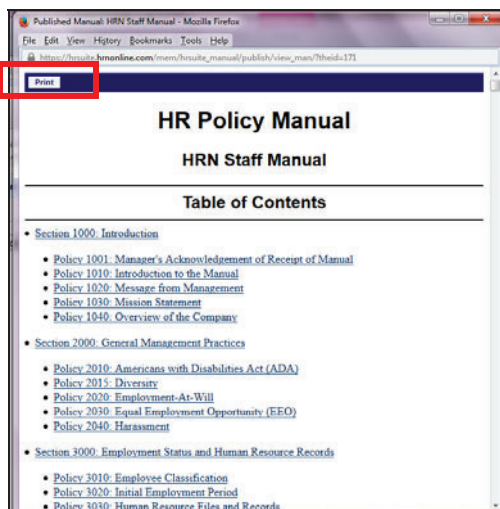
1. Click on the “Working Manual” tab at the top left of the screen to make sure you are in the Working Manual.
2. Using the plus signs to the left of each folder, expand the “MANUAL ADMINISTRATION” and the “PUBLISHING TOOLS” folders.
3. Click on the “View and Post Published Manuals” link in the “PUBLISHING 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.

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

