

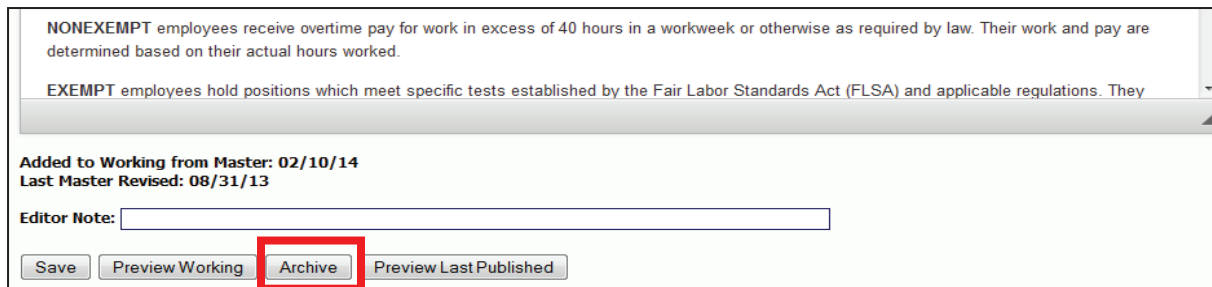
# Archiving Policies

If you wish to make a copy of a policy before making changes to it, you can place a copy in the Archive. This section describes how to add policies from the Working Manual into the Archive. See pages 44-45 for information on viewing policies in the Archive and restoring policies from the Archive back into the Working Manual.

A policy can be archived one of two ways: At the individual policy level, which allows you archive a single policy, or using the Multi-Archive Utility, which allows you to archive multiple polices at once.

## *Archive a Single Policy at 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 WORKING MANUAL” folders.
3. Open the policy you wish to archive.
4. Click the Archive button below the policy content area and a ‘point in time’ copy of this policy will be added the Archive area.



The screenshot shows a policy editor interface. At the top, there is a text area with the following content: "NONEXEMPT employees receive overtime pay for work in excess of 40 hours in a workweek or otherwise as required by law. Their work and pay are determined based on their actual hours worked." Below this, there is a scrollable area containing the text: "EXEMPT employees hold positions which meet specific tests established by the Fair Labor Standards Act (FLSA) and applicable regulations. They". Underneath the scrollable area, there is a section with the text: "Added to Working from Master: 02/10/14" and "Last Master Revised: 08/31/13". Below this, there is an "Editor Note:" label followed by a text input field. At the bottom of the interface, there are four buttons: "Save", "Preview Working", "Archive", and "Preview Last Published". The "Archive" button is highlighted with a red rectangular box.

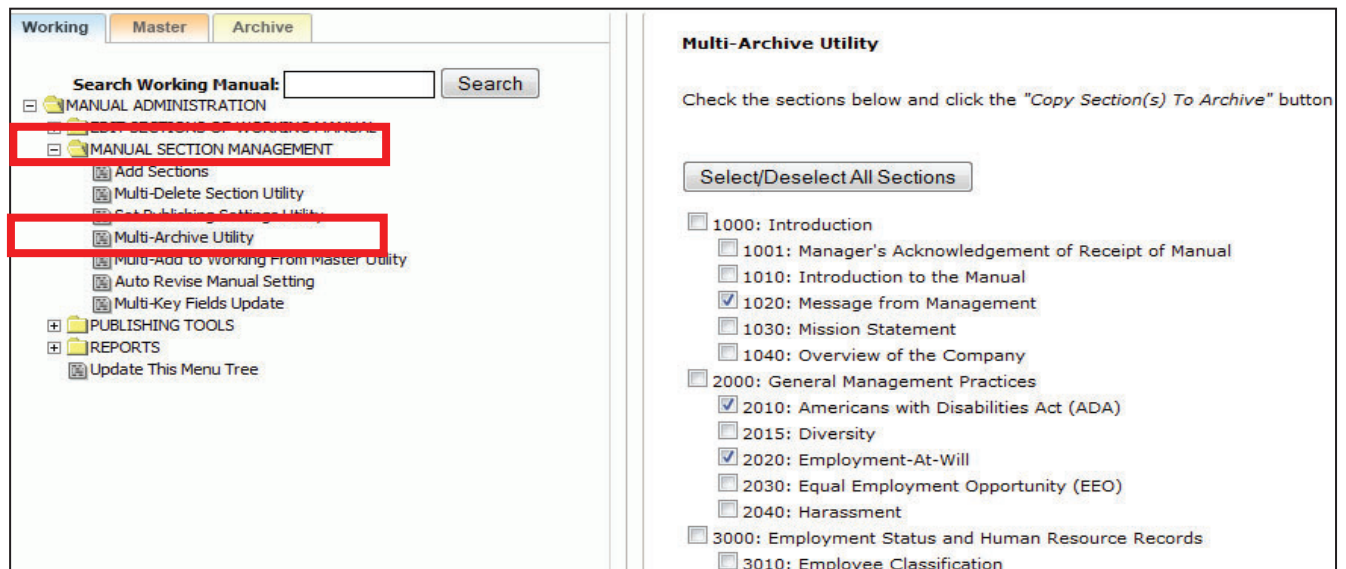
5. Once in the Archive, the archived version of the policy can be viewed, printed or restored back to the Working Manual.

**Archive Tip #1:** Use the archive to save copies of policies that you have customized and are using in your organization, but are about to change. This will simply retain a copy of what the policy was before you made the change. Model Policies that have not been customized do not need to be archived. Any model policy can be accessed at any time from the Master Manual. This will help keep your Archive area easier to maintain.

**Archive Tip #2:** Many organizations want to archive a yearly (or semi-annual) copy of all policies for historical purposes. Often the policies have not changed, but a full point in time copy of all polices is required. If you are archiving the entire manual for historical purposes, it is recommended that you Publish the manual and retain the Published Manual as the historical archive. This will help keep your Archive area easier to maintain. Keep in mind that a published manual version of a policy cannot be restored back to the Working Manual, but often the historical archive is not meant for that purpose.

## Archive Multiple Policies at One Time

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 “Multi-Archive 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 a checkbox next to each policy.
5. Click the checkbox next to each policy you want to archive.

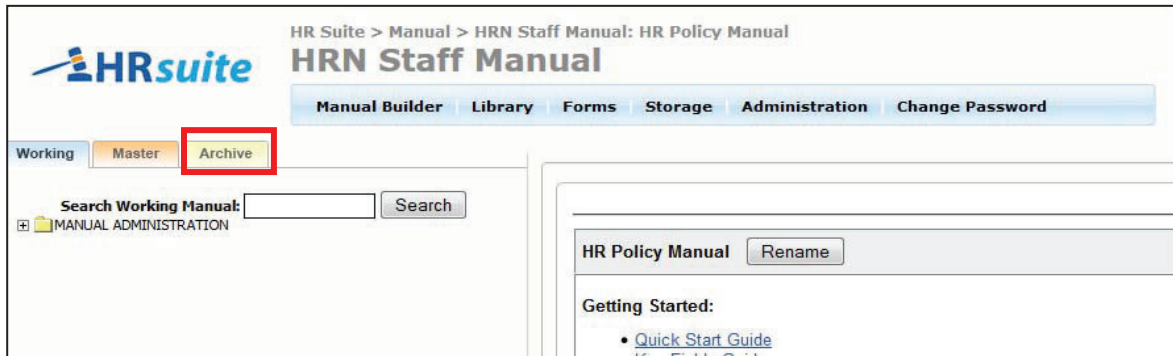


6. Scroll to the end of the page and click the “Copy Section(s) to Archive” button.

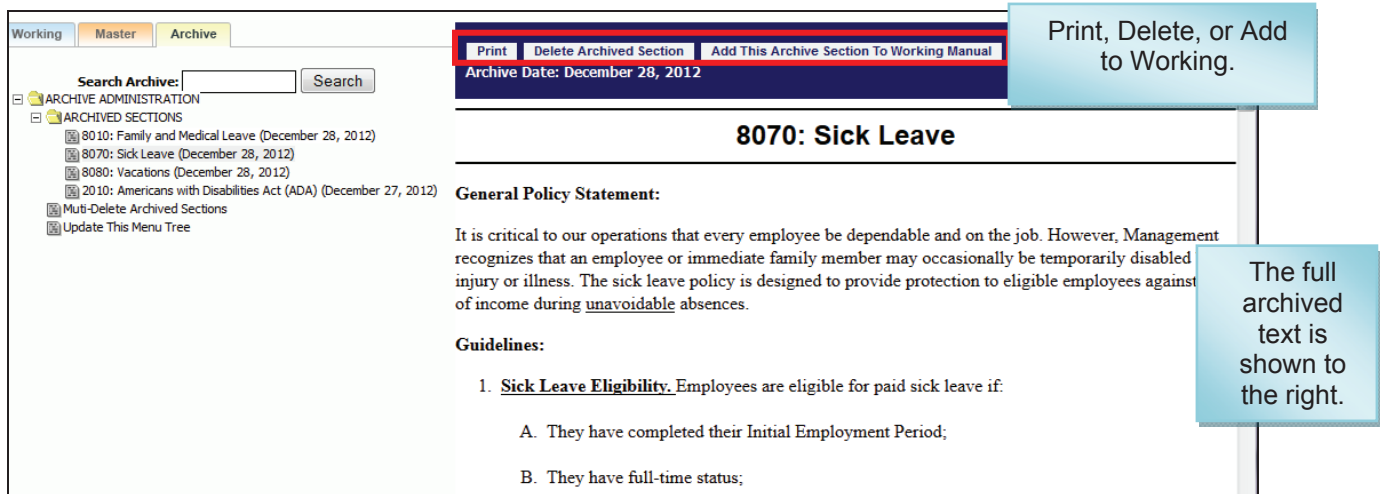


# Accessing the Archive

1. Click on the “Archive” tab at the top left of the screen to make sure you are in the Archive.



2. Using the plus signs to the left of each folder, expand the “ARCHIVE ADMINISTRATION” and the “ARCHIVED SECTIONS” folders. A listing of all archived policies is available underneath the “ARCHIVED SECTIONS” folder. Archived policies are in descending date order.
3. Click on any of the archived sections and the full text of that archived policy will appear on the right hand side of the screen.
4. Using the buttons above the content, you can view and print the text, as well as delete the archived policy, or copy this entire policy back into your Working Manual.



## Un-Archiving a Policy

**Tip:** When un-archiving, be sure to first remove the unwanted policy version from your Working Manual (see page 32), then un-archive the proper version of the policy. Un-archiving a policy will not overwrite the policy in the *Working Manual*. If you do not remove the unwanted policy first, you will then have two policies (the correct and the incorrect) in your Working Manual.

1. Click on the “Archive” tab at the top left of the screen to make sure you are in the Archive.
2. Using the plus signs to the left of each folder, expand the “ARCHIVE ADMINISTRATION” and the “ARCHIVED SECTIONS” folders. A listing of all archived policies is available underneath the “ARCHIVED SECTIONS” folder.
3. Click on the policy you wish to un-archive.
4. Click the “Add This Archive Section to Working Manual” button, and the policy is now added back to your Working Manual.

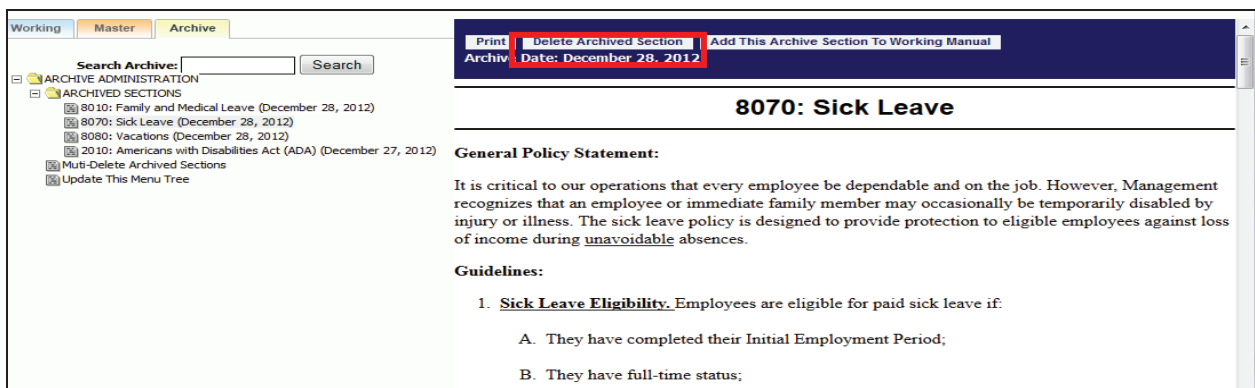
The screenshot displays a web application interface with three tabs at the top: "Working", "Master", and "Archive". The "Archive" tab is selected. On the left, a search bar is labeled "Search Archive:" with a "Search" button. Below it, a tree view shows "ARCHIVE ADMINISTRATION" expanded to "ARCHIVED SECTIONS", which lists several policies including "8070: Sick Leave (December 28, 2012)". On the right, a dark blue header bar contains buttons for "Print", "Delete Archived Section", and "Add This Archive Section To Working Manual", with the latter highlighted by a red box. Below the header, the title "8070: Sick Leave" is centered. The main content area includes a "General Policy Statement:" followed by a paragraph about the importance of employee dependability and sick leave protection. Below this, "Guidelines:" are listed, starting with "1. Sick Leave Eligibility. Employees are eligible for paid sick leave if:" followed by sub-points A and B.

## Deleting Archived Policies

Policies can be deleted from the Archive in one of two ways: At the individual archived policy level, which allows you to view the content of the archived policy before deletion, or using the Multi-Delete Archived Utility, which allows you to delete multiple archived policies at one time.

## Deleting a Single Archived Policy at the Archived Policy Level

1. Click on the “Archive” tab at the top left of the screen to make sure you are in the Archive.
2. Using the plus signs to the left of each folder, expand the “ARCHIVE ADMINISTRATION” and the “ARCHIVED SECTIONS” folders. A listing of all archived policies is available underneath the “ARCHIVED SECTIONS” folder.
3. Click on the archived policy that you want to delete.
4. The archived text will appear on the right side of the screen.
5. Click the “Delete Archived Section” button above the content.
6. A confirmation box will pop up asking you to confirm the deletion. Click OK.



## Deleting Multiple Archived Policies at one Time

1. Click on the “Archive” tab at the top left of the screen to make sure you are in the Archive.
2. Using the plus signs to the left of each folder, expand the “ARCHIVE ADMINISTRATION” and the “ARCHIVED SECTIONS” folders. A listing of all archived policies is available underneath the “ARCHIVED SECTIONS” folder.
3. Click on the “Multi-Delete Archived Sections” link in the navigation. This is found under the listing of the archived sections (if your archive is very full, you may need to scroll to see this link).
4. This will bring up a list of all policies currently in the Archive, with a checkbox next to each.
5. Check the checkbox next to each archived policy that should be deleted.
6. Click the “Delete Selected Sections from Archive” button.
7. A confirmation box will pop up asking you to confirm the deletion. Click OK.

