CU PolicyPro
USER'S GUIDE

USER' GUIDE

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Getting Started: General Information & Support

Before your Policy Manual can be printed and distributed, important information should be customized. In their original form, our model policies are comprehensive and provide an excellent foundation for regulatory compliance. However, each Credit Union is unique, and with this in mind, we have provided several tools to help you tailor the model policies in CU PolicyPro to fit your operation.

While significant effort has been made to address federal compliance issues in the Manual, laws and regulations change frequently. Additionally, individual state and local laws have not been addressed here and are very diverse. Therefore, you may want to have the Manual, or portions of it, reviewed by legal counsel.

Technical support is provided by the staff at CU Solutions Group. If you have questions or need assistance, please email hrsupport@cusolutionsgroup.com or call 800-262-6285 x527.

Credit unions in **Pennsylvania** or **Delaware** may contact 800-932-0661, Option #3 or policypro@pcua.coop.

Good Luck!

Getting Started: Logging In

The main login screen for CU PolicyPro can be accessed at http://policypro.leagueinfosight.com.

Each user will need a User Name and Password to login.

If you have forgotten your password, you can use the "I Forgot My Password" link on the left side of the screen.

Getting Started: The Home Page

The Home Page of CU PolicyPro provides the user with information, navigation resources, and other resources as provided by the credit union's administrator.

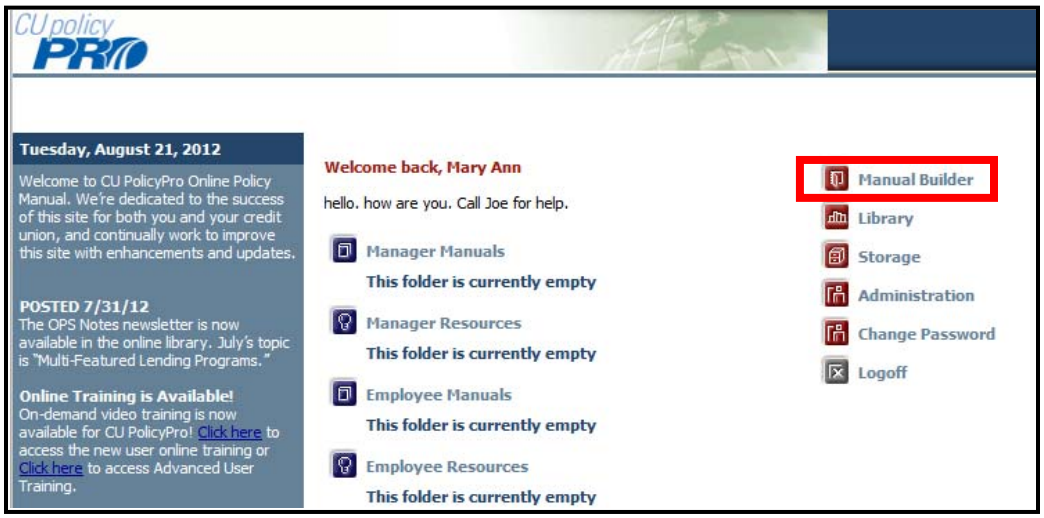
The **left side** of the screen will provide information on any updates to the system, new documentation updates, upcoming training information, and the release of the monthly newsletter, OPS Notes. Information on who to contact for technical support is also located in this area.

The **center area** of the screen provides a welcome message to the user, and any resources that have been posted by the credit union's administrator. Access to resources is determined by the user's login. "Manager Resources" and "Manager Manuals" are available to users with full administrative rights, or to users who have been granted access to these resources. "Employee Resources" and "Employee Manuals" are available to all users.

The **right side** of the screen has the navigation menu to access the various areas of the site. Again, depending on the user's access rights, they may or may not see all of the navigation items on the right side. A user with full administrative access would see all available navigation buttons.

Working with Policies: Accessing & Navigating Manual Builder

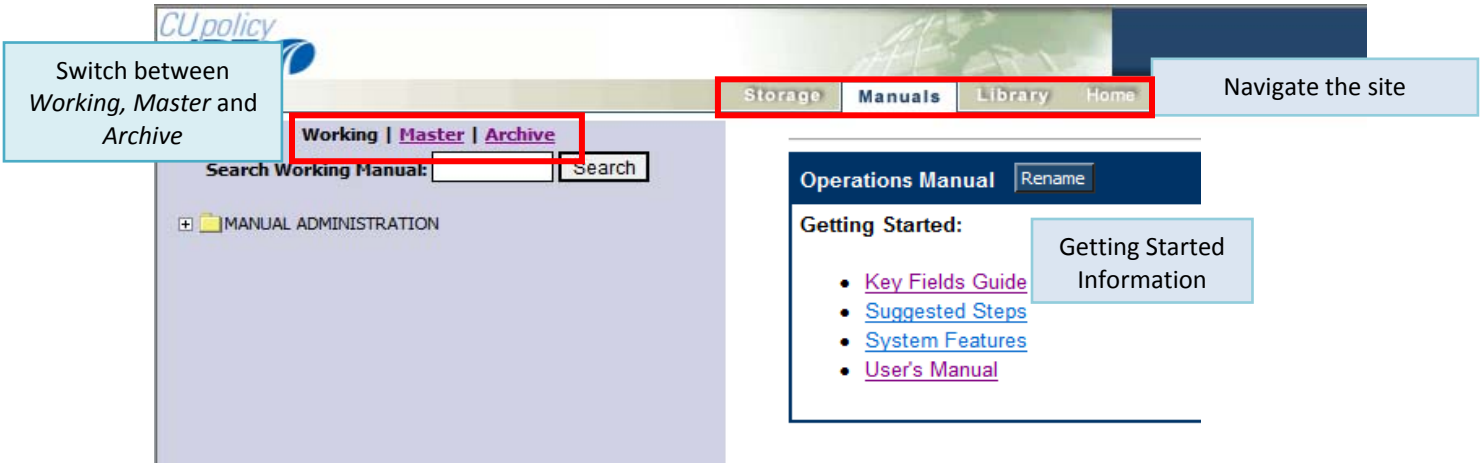
All policies are housed in the MANUAL BUILDER area of CU PolicyPro. Manual Builder can be opened by clicking on the "MANUAL BUILDER" link on the right side of the screen when you first login.



Near the top left of the screen, there are links to access the *Working Manual*, *Master Manual* and *Archive*. When you access MANUAL BUILDER, by default you will be in the *Working Manual*. Click on the links to switch between the *Working Manual*, *Master Manual* and *Archive.*

When you first enter the MANUAL BUILDER area, some resources for Getting Started are available on the right side of the screen. As you move through the navigation found in the *Working Manual*, *Master Manual* and *Archive,* the information on the right side will change.

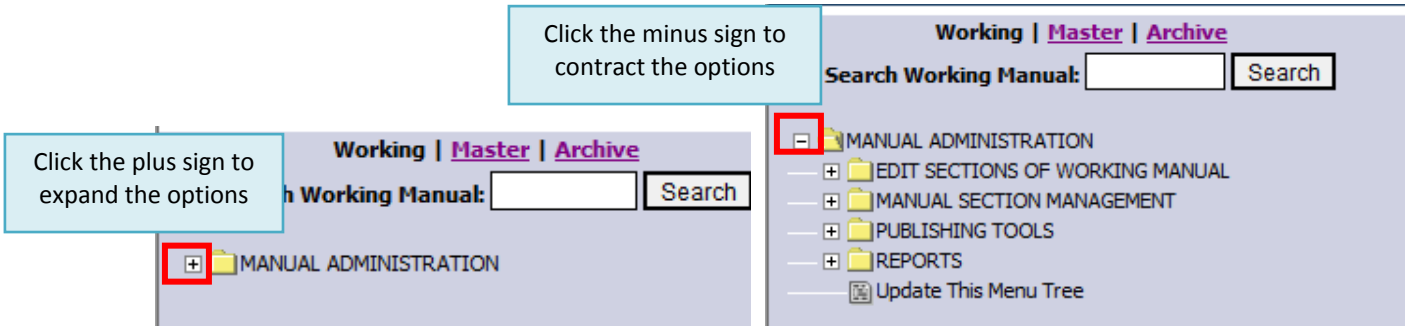
Navigation to other areas of CU PolicyPro is available at the top of the screen. Clicking on the "Home" button will return you to the Home Page.



Whether you are in the *Working Manual*, *Master Manual* or *Archive*, the navigation will be along the left side of the screen, starting with a folder titled “Manual Administration”. Additional folders of navigation are contained within the “Manual Administration” folder.

A plus sign to the left of any folder indicates that there are more options beneath it. Click the plus sign to expand the folder and view the available options.

A minus sign indicates that the folder is expanded. Clicking the minus sign will contract the folder.



Working with Policies: Important Definitions

- The ***Working Manual*** is used to maintain and customize the policies for your credit union. Your CU PolicyPro manual was set up one of two ways, depending on when it was set up. For more information on how to access your Working Manual to see which way your manual has been set up, see pages 15-16.

  Method 1: The Working Manual was pre-filled with all 200+ model policies from the Master Manual. Many credit unions set up with this method have chosen to remove all policies except for the select set of policies they want to start working with. This can make customizing and updating policies much less overwhelming. Any model policy that is removed from your Working Manual can be added back at any time.

  Method 2: The Working Manual was set up with the chapter folder structure, but no model policies were added.

- The ***Master Manual*** contains all available model policies. Any model policy can be copied from the *Master Manual* and placed into the *Working Manual*.

- The ***Archive*** allows you archive policies from the Working Manual. Policies are typically archived when they policy has been in use by the credit union and is about to be changed in some way.

Working with Policies: Viewing & Printing Model Policies

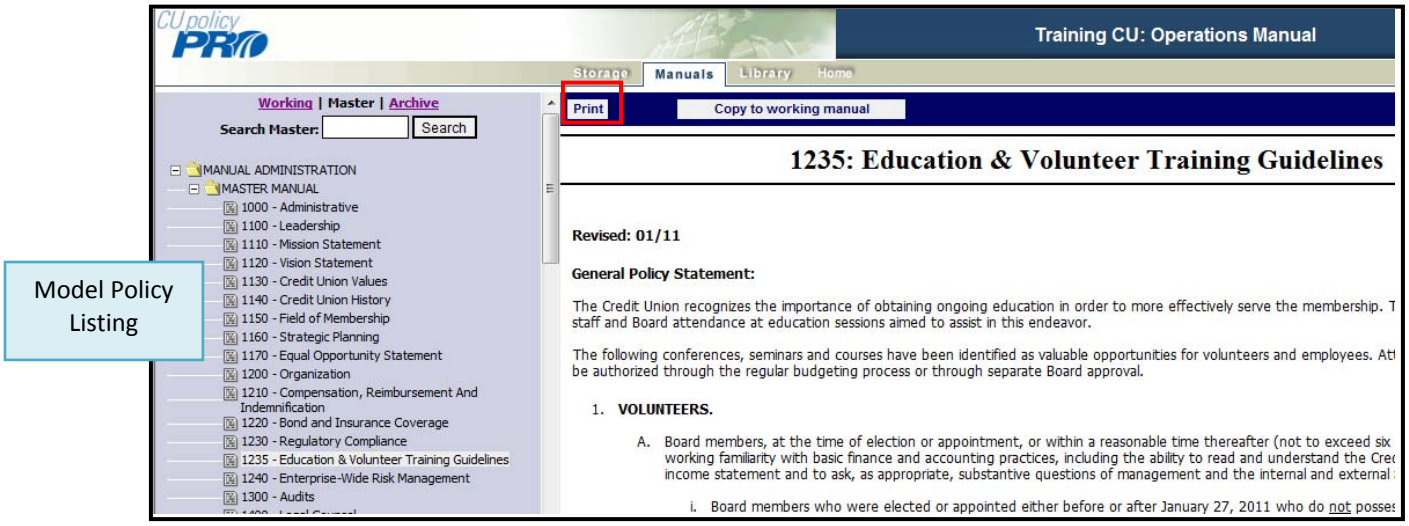
1. Click on the “Master” link at the top left of the screen to make sure you are in the *Master Manual*.

2. Click the plus sign next to the “Manual Administration” folder and the “Master Manual” folders to expand both folders.

3. You will see a listing of all the available model polices.

4. Click on the model policy you would like to view, and the full text of the policy will appear on the right side of the screen.

5. To Print a model policy, click the “Print” button at the top of the model content.



Working with Policies: Adding Policies to the Working Manual

Model policies from the *Master Manual*, or your own unique policies, can be added to your *Working Manual*.

Adding Model Policies from the *Master Manual* to the *Working Manual*

Adding model policies from the *Master Manual* to the *Working Manual* can be done one of two ways.

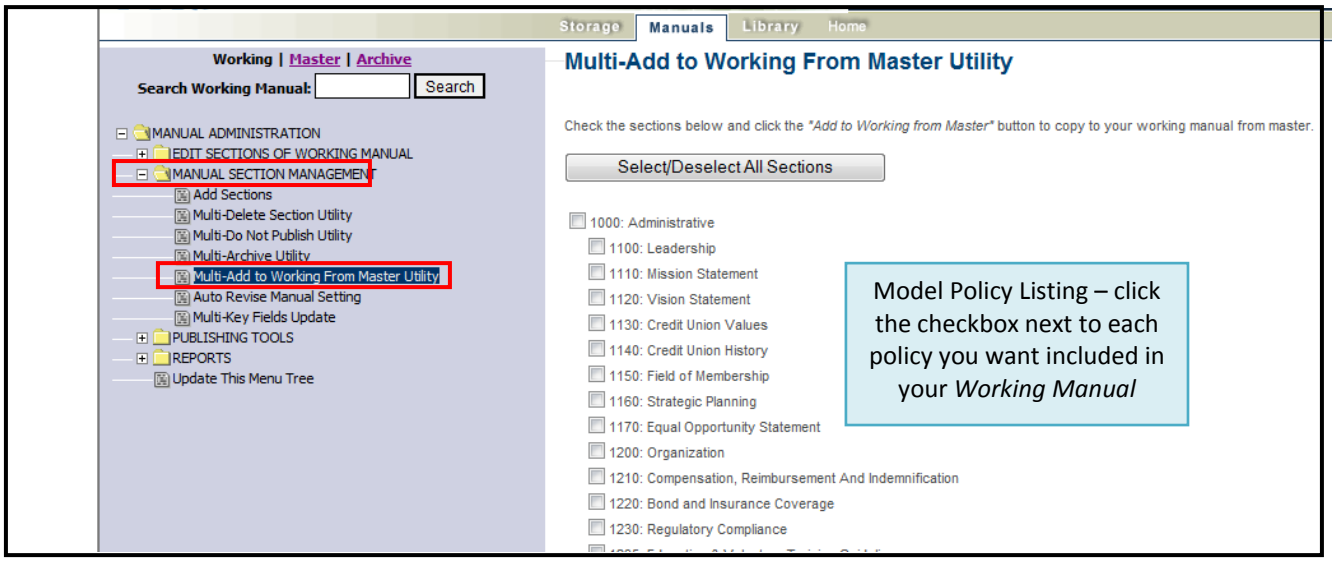
Option 1: Add multiple policies at one time. This option works best if you know exactly what policies you’d like to bring into your *Working Manual*, and do not need to review the content prior to bringing the content into your *Working Manual*.

1. Click on the “Working” link at the top right 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. Under the “Manual Section Management” folder, click the “Multi-Add to Working from Master Utility” link. On the right side of the screen, a form will appear listing all model policies available from the *Master Manual*, with a checkbox next to each policy.

4. Click the checkbox next to each model policy that you want to move from the *Master Manual* to your *Working Manual*.



5. Scroll to the end of the page and click the "Add to Working from Master" button. The current model policy version from the *Master Manual* for each selected policy will be added to your *Working Manual*.

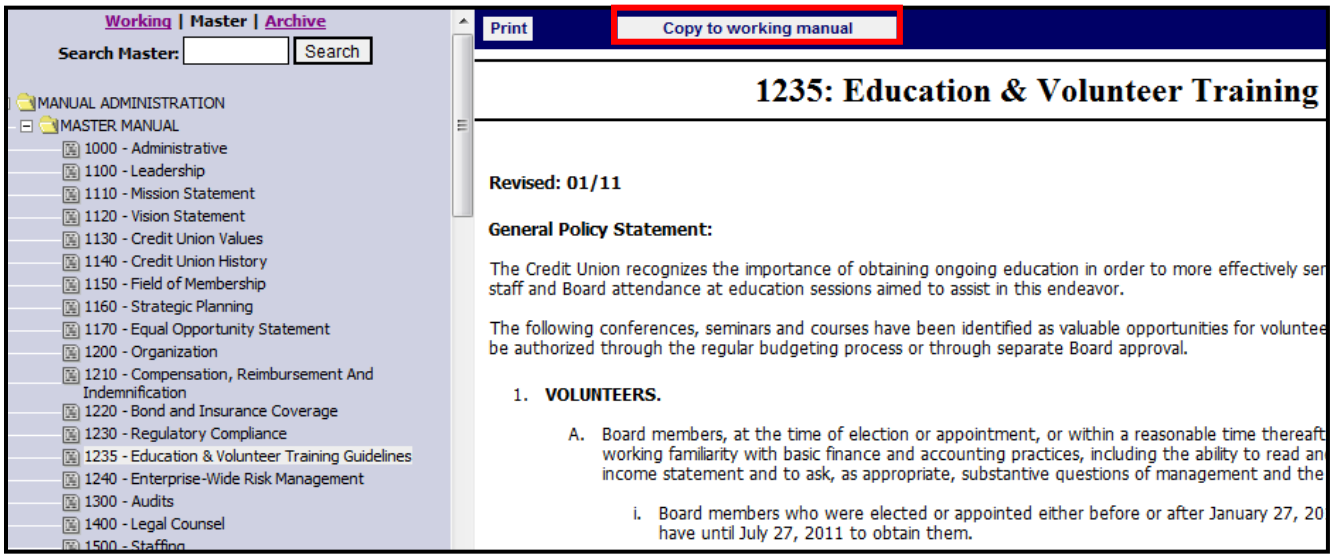
Tip#1: the model content is divided into eleven chapters. The chapters are numbered from 1000 – 11000. Each chapter page is divisible by 1000 (1000, 2000, etc). Chapter pages include a table of contents for what is included in the chapter, but do not include policy content. The chapter pages have been already included in the *Working Manual*, and unless they were intentionally removed by the credit union, chapter pages do not need to be added into the *Working Manual*.

Tip#2: If you are adding new policies to your working manual, this is the only step necessary. If you are replacing any old policies in your *Working Manual* with updated policies in the *Master Manual*, first remove all the old policies from your Working Manual (see page 42 to remove policies), then bring in the updated policies. Bringing in an updated policy will not overwrite the old policy, but you will then have two policies (the old and the new) in your Working Manual.

Adding Model Policies from the *Master Manual* to the *Working Manual* (continued)

Option 2: Add one policy at a time. This option works best if you want to review the content of a model policy before bringing the policy from the *Master Manual* to the *Working Manual.*

1. Click on the "Master" link at the top right of the screen to make sure you are in the *Master Manual*.
2. Using the plus signs to the left of each folder, expand the "Manual Administration" and the "Master Manual" folders.
3. You will see a listing of all the available model polices.
4. Click on the model policy you would like to view, and the full text of the policy will appear on the right side of the screen.
5. Click the "Copy to Working Manual" button to move a copy of this model policy to the *Working Manual*.



Adding Unique Policies to the *Working Manual*

1. Click on the "Working" link at the top right 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.

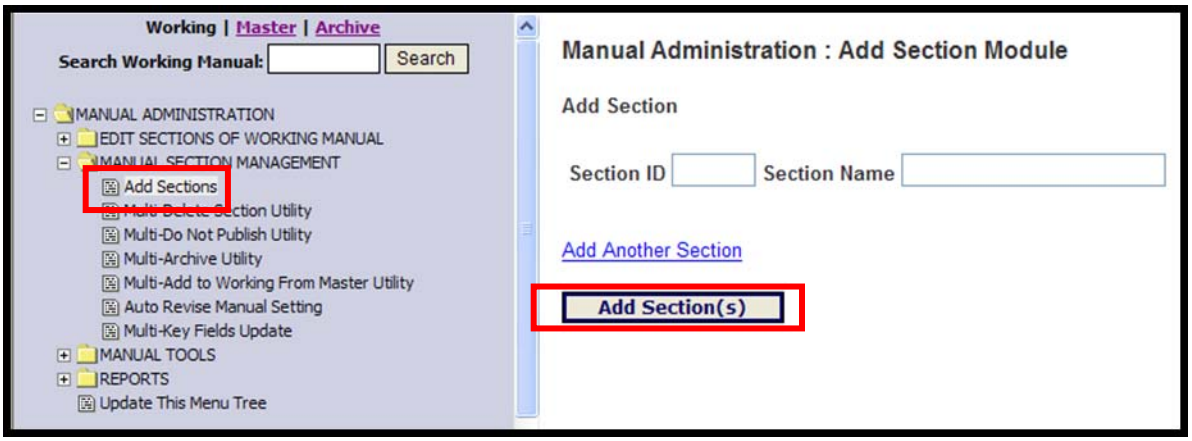
3. Click the "Add Sections" link

4. On the right side of the screen, a form will appear to allow you to add a unique policy. Type the policy number in the "Section ID" field and the policy name in the "Section Name" field.

   Tip: The policy number must be greater than 1000. Section numbers below 1000 have no associated Chapter folder and will not be accessible for editing in the *Working Manual*.

5. To add more than one policy at one time, click the "Add Another Section" link.

6. Click the "Add Section" button. This creates a blank policy in your *Working Manual*. The new policy will appear in the Working Manual in numeric order.

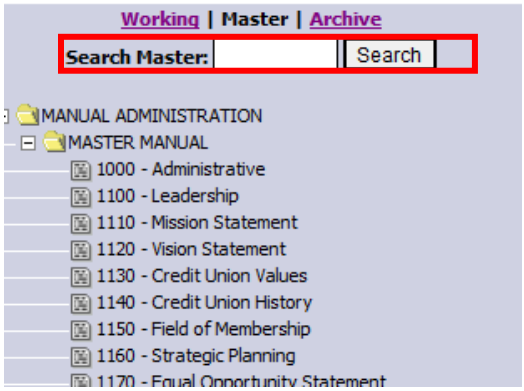


7. To add a new chapter, type in the Chapter number in the "Section ID" field and Chapter name the "Section Name" field. Chapters must be divisible by 1000 (i.e. 12000, 13000, etc.). Policies will not be available for editing in the *Working Manual* if they do not have an associated Chapter.

   Tip: If you accidently give your new policy the same number as an existing policy, don't worry! You won't overwrite the existing content. You will simply have two policies with the same number. However, this is not recommended, so if you notice that you have duplicated a policy number, we recommend changing the number on the new policy you created.

Working with Policies: Finding a Specific Policy

If you're looking for a specific policy, you can use the "Search" function, found in the upper left side of the navigation. Either the *Working Manual* or *Master Manual* content can be searched; however, for a complete search of the model content, we recommend you search from the *Master Manual*.



Also, the **Alphabetical Policy List** is a great tool to find a specific policy. The Alphabetical Policy List is found in the Library under the TOOLS folder.

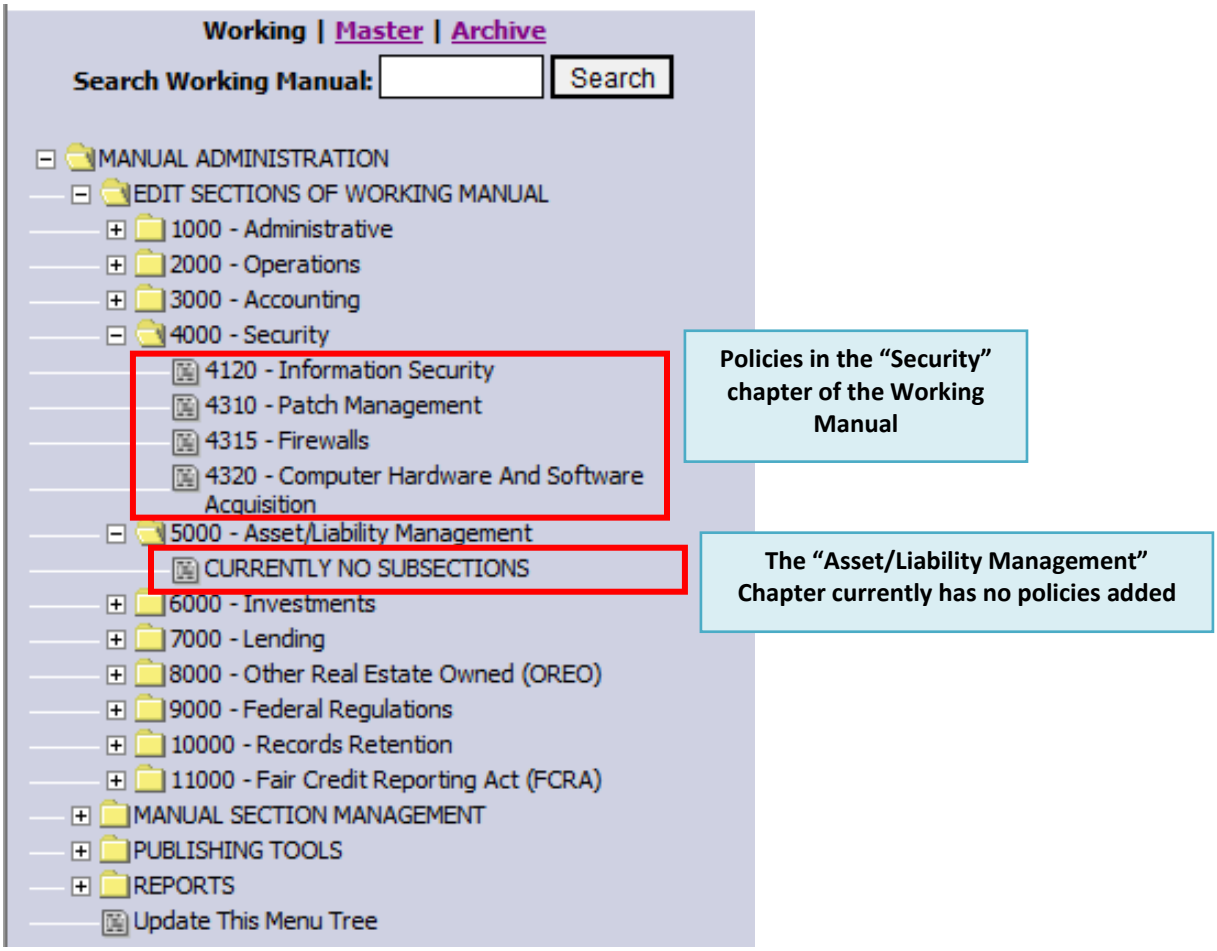
Working with Policies: Navigating the Working Manual

1. Click on the "Working" link at the top right 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. The *Working Manual* is divided into Chapters, covering different operational topics. Expand each chapter folder to view the policies found within that chapter. Note: if you haven't added any policies to a particular chapter, you will get the message "Currently No Subsections" when you expand the chapter folder.

   Remember that the *Working Manual* may not contain all of the available model policies, but model policy content can be added at any time from the *Master Manual*. See pages 11-14 to add additional policies to the *Working Manual*.



4. Click on the selected policy within the *Working Manual*, and on the right side of the screen the full text for that policy will show. Note: Chapter pages can also be selected and edited. However chapter pages contain a piece of code that will generate a Table of Contents for that particular chapter and do not contain policy content.

   Note: On the chapter pages, for manuals created prior to January 2011, the Table of Contents is not code, but simple text that may need to be updated as you add or remove policies while customizing your manual. Some credit unions choose to remove the Table of Contents and add an introductory paragraph for that section to avoid the task of updating the TOC, or choose to insert Chapter List Code. For help on inserting a Chapter Code List, contact hrsupport@cusolutionsgroup.com.

Editing Policies: General Information

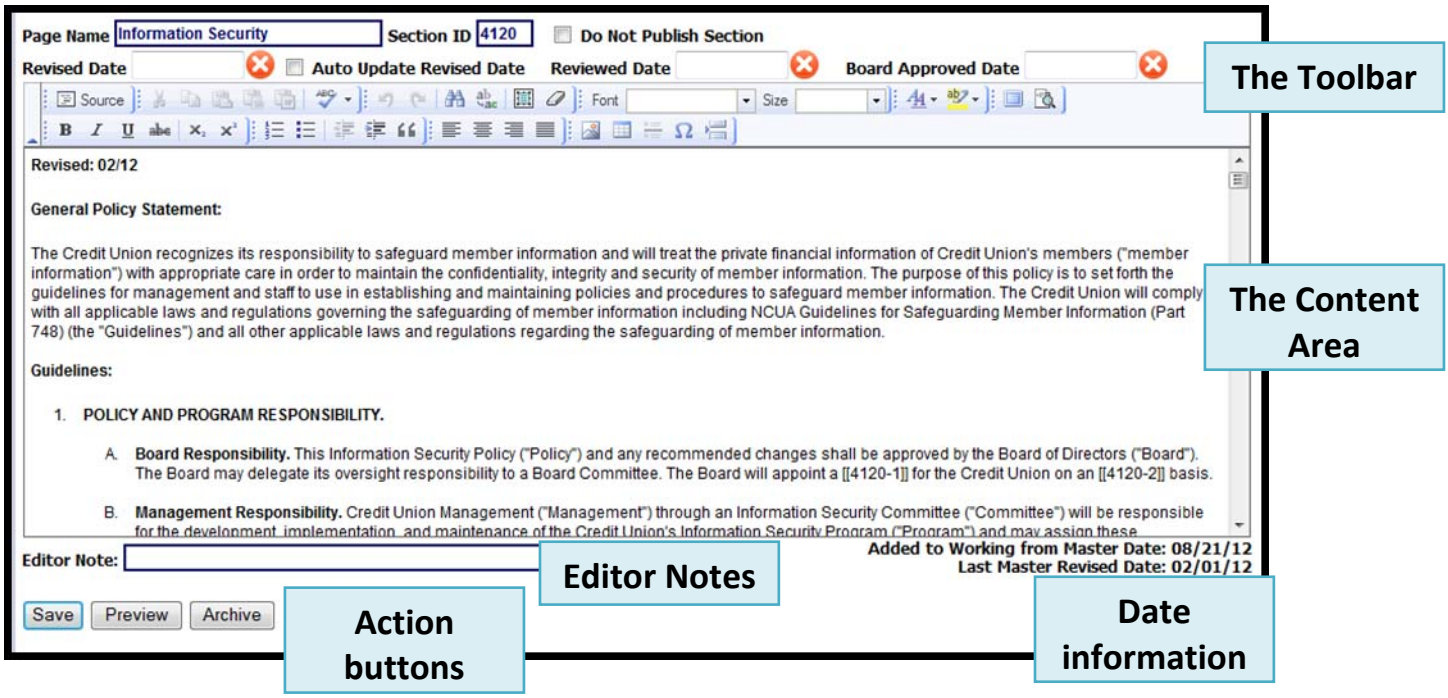
When you open a specific policy, the full text of the policy is available on the right side of the screen. It opens within a content editor, allowing full customization of the text.

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.

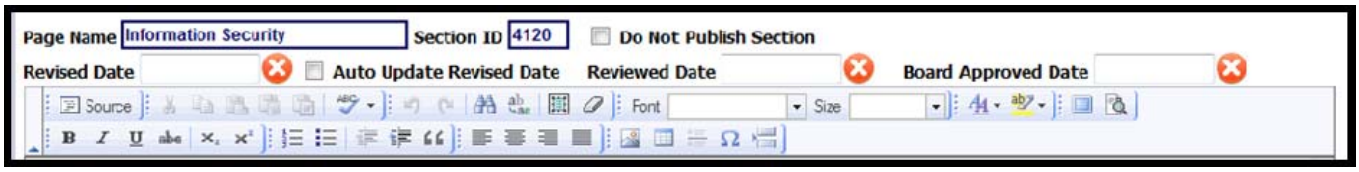
Below the content area are editor notes, date information specific to the policy, and action buttons to save, preview or archive the content.

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

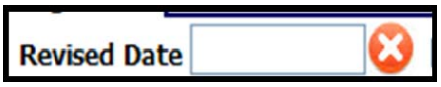


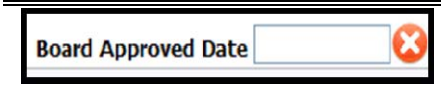
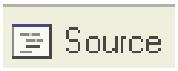
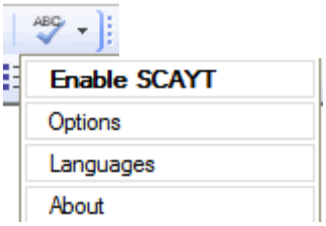
Editing Policies: The Toolbar

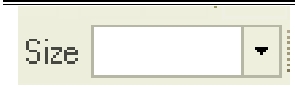
When adding or editing content, you will be in an editing environment that is similar to MS Word. The Toolbar has many of the same tools that are used in Word.



The following section outlines the functions of each item in the Toolbar.

Icon	Function
	The Page Name field is the title of the Policy. This can be updated at any time. This will update the main Table of Contents in a published manual, but any changes made here will need to be manually update on the Chapter page Table of Contents
	The Section ID 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.
	Checking the "Do Not Publish Section" box will omit this section from any manuals published from this point forward (until the box is unchecked). For more information on publishing, see pages 44-50.
	Click in the "**Revised Date**" field to open a calendar that allows you to select the Revised Date for that policy. The Revised Date will appear below the title of the policy in the published manual. Click the to remove the Revised Date.
	Checking the "**Auto Update Revised Date**" button will automatically place the current date in the "Revised Date" field each time the policy is saved. See page 43 for information on how to automatically check or uncheck this box on all policies in your manual.

Icon	Function
	Click into the "**Reviewed Date**" field to open a calendar that allows you to select the Reviewed Date for that policy. The Reviewed Date will appear below the title of the policy in the published manual. Click the to remove the Reviewed Date.
	Click into the "**Board Approved Date**" field to open a calendar that allows you to select the Board Approved Date for that policy. The Board Approved Date will appear below the title of the policy in the published manual. Click the to remove the Board Approved Date.
	**The Source** icon 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.
	Common editing icons for **Cut**, and **Copy**
	Paste Text – Pastes text into the content as Plain Text. All formatting is removed from the pasted text.
	Paste from Word – Pastes text into the editor while stripping out the code used in MS Word, which can interfere with formatting in the CU PolicyPro editor. This is recommended when pasting from Word. See page 22 for more information on this tool.
	**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 does not open a pop up for misspelled words, but 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.
	Standard "**Undo**" and "**Redo**" icons. Users can "undo" or "redo" multiple steps.
	Find – Allows you to search the current policy for specific text.

Icon	Function
	Replace – Allows you to search the current policy for specific text and replace it with new text.
	Select All – This icon will select all of the text in the editor. The shortcut for this action is CTRL+A.
	Remove Formatting – removes all formatting from any highlighted text
	Font – Standard tool to allow changes to font type face.
	**Size** – Standard tool to allow changes font size.
	Text Color – allows color changes to highlighted text.
	Background Highlighting – Highlights behind text.
	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.
	Show Blocks. Shows individual blocks of text throughout the document.
	Common editing icons for **Bold**, **Italic, Underline, Strikethrough, Subscript** and **Superscript**
	Numbering and **Bullets –** standard icons for applying numbering and bullet formats. See pages 23-36 for more information on applying these styles.
	Block 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.
	Block Quote. Creates indention to the left and right of a block of text. Often used to offset text within a document.

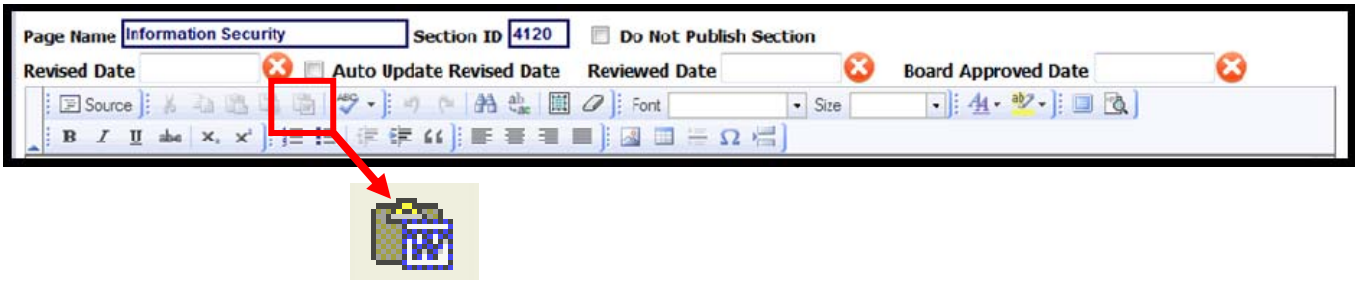
Icon	Function
	Justify Tools. Standard formatting tools to justify text to the **left**, **center**, **right** or **block justify**.
	Insert/Edit Graphics. Inserts a graphic image into the content. See pages 26-27 for more information on inserting graphics.
	Insert/Edit Table. Inserts a table into a table or allows editing of an existing table. See pages 28-29 for more information on Tables.
	Horizontal Rule – places a horizontal line across the screen.
	Character Map – allows the placement of special characters within the text.
	Page Break – Allows the user to manually insert a page break when this page is printed (single policy print or published manual print).

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, rather than using CTRL+V or a right click to paste in the text.** See below for more information on using these icons.

Editing Policies: Paste from Word

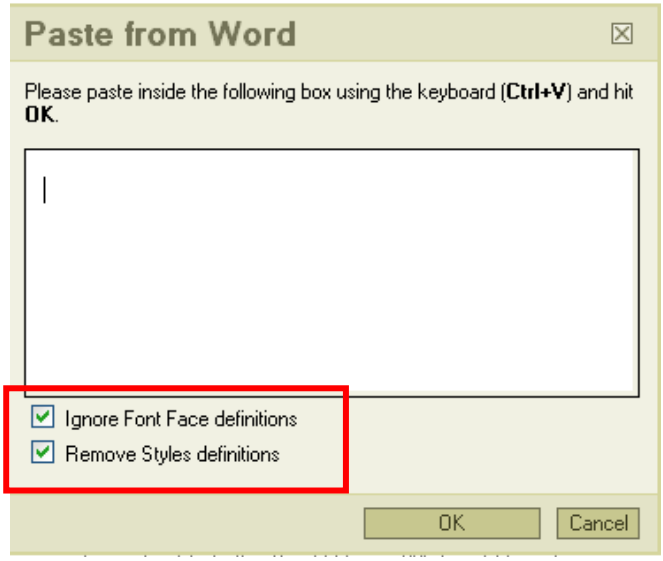


1. Highlight and copy the text in the Word document.

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 in the content and make some additional selections. Use CTRL+V to paste the content into the dialog box.

   We recommend checking both the "Ignore Font Face definitions" and the "Remove Styles Definitions" boxes.



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 issue.

   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 will 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 will not be retained. Tables must be used to recreate the columns. See pages 28-29 for more on how to build a table.
   - **Spacing**. Extra space between paragraphs is common, and extra spaces often need to be removed.

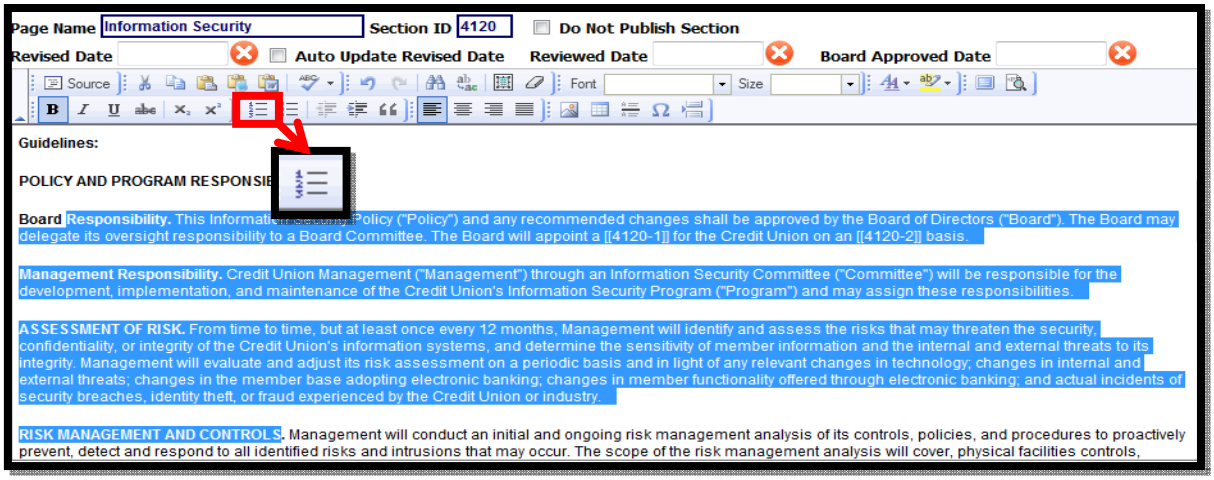
Editing Policies: Creating and Formatting Numbered & Bulleted Lists

Most of the policies within CU PolicyPro use extensive numbering and sub-numbering.

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 explanation or screen shots for bulleted lists.

Applying Numbered Lists to Paragraph Text

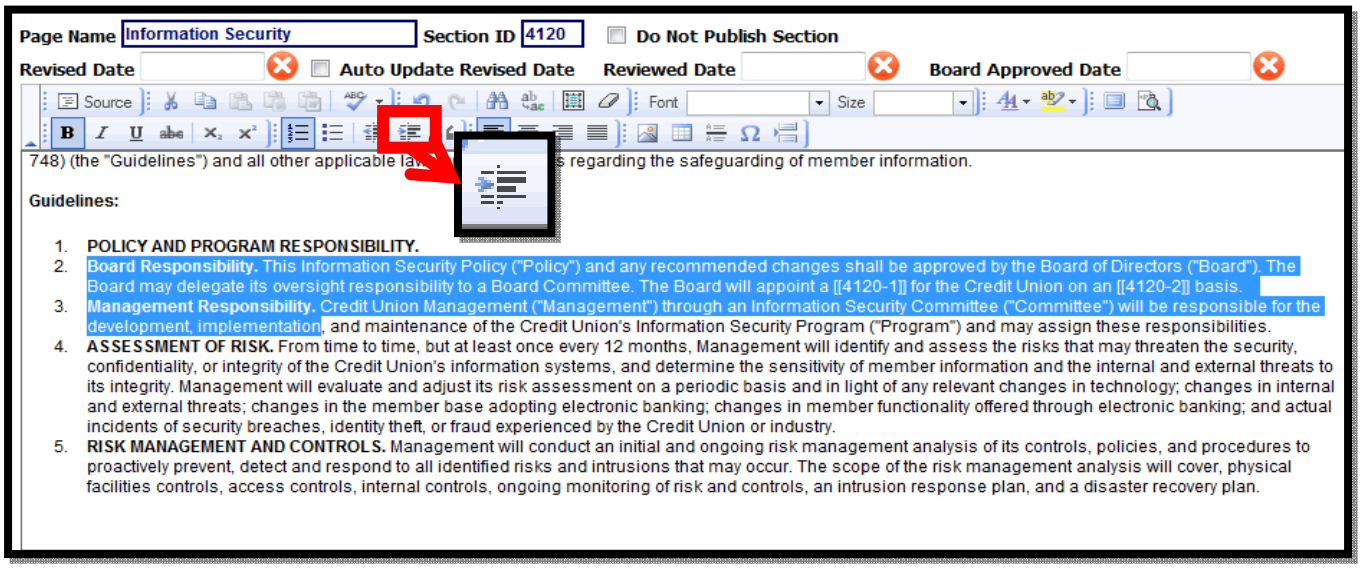
1. To use the numbering function, highlight the text to be put into a list and click the numbering icon.



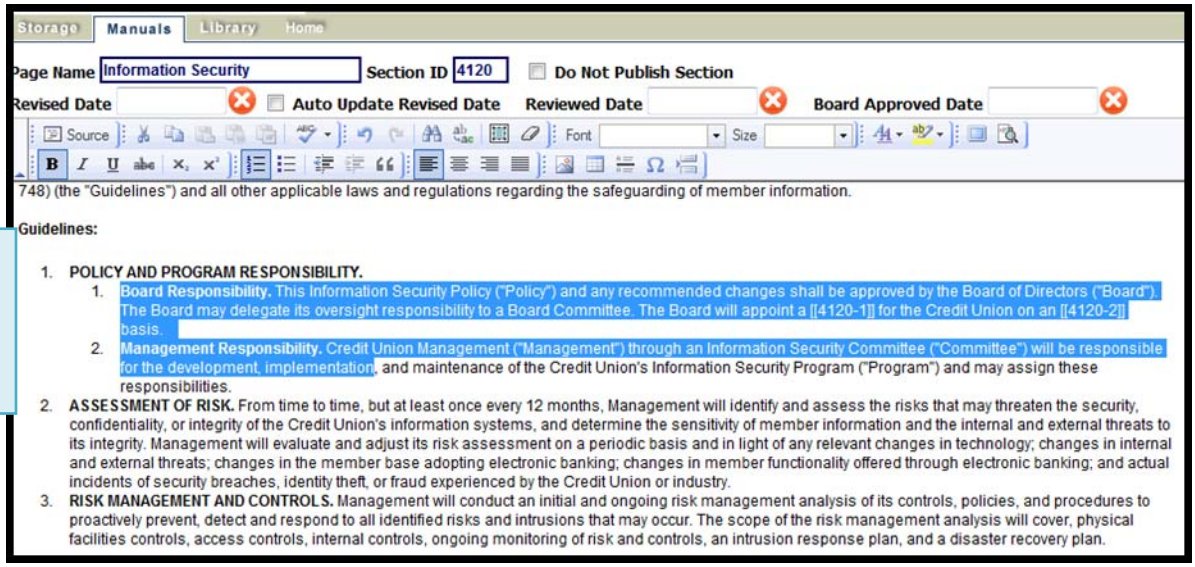
Creating a Sublist in an Existing Numbered List

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 "Block Indentation" icon.
   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.

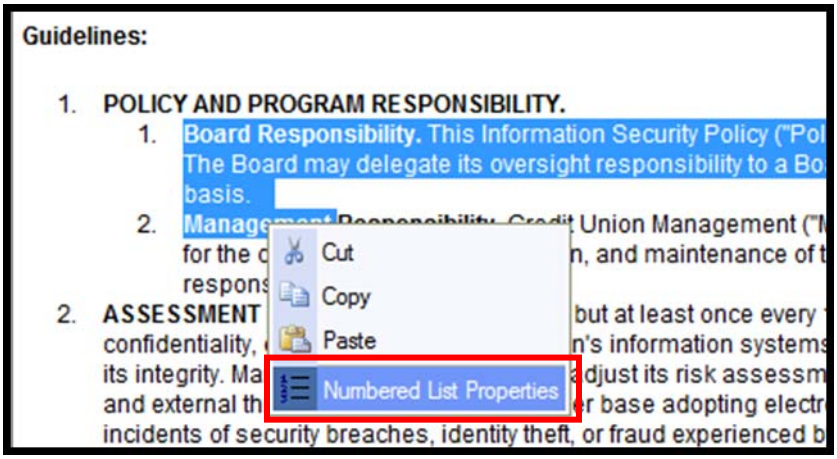


3. By default, the sublist will have the same numbering structure as its parent list.



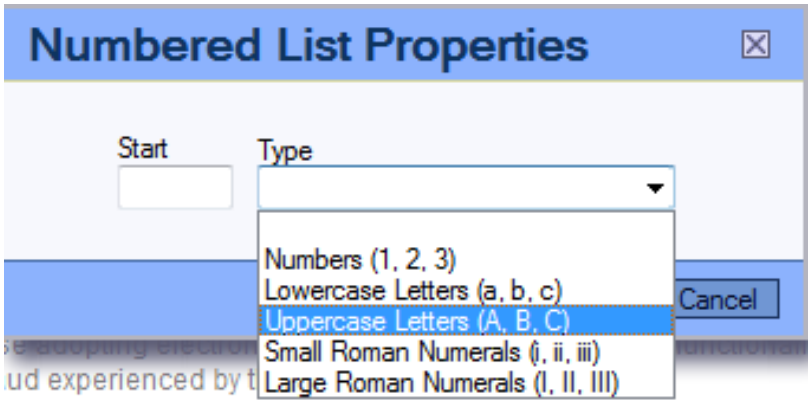
The sublist has the same formatting as the parent list style.

4. To change the style of the numbered list, **right click** on the highlighted text, and choose "Numbered List Properties".



5. A dialog box will pop up with several different numbering styles to choose from (in a dropdown list).

6. 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.



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 CU PolicyPro 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 into 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 into 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. Click 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 "Block Indentation" icons.

   a. If the item should be in a sublist position (needs to indent to the right), use the "Block Indentation" icon with the right arrow (increase indent).

   b. If the item should be in a parent position (needs to outdent to the left), use the "Block Indentation" icon with the left arrow (decrease indent). The left "Block Indentation" icon can be used more than once if the item needs to move to a farther left position.

   c. If the item is in the correct position, move on to Step 5.

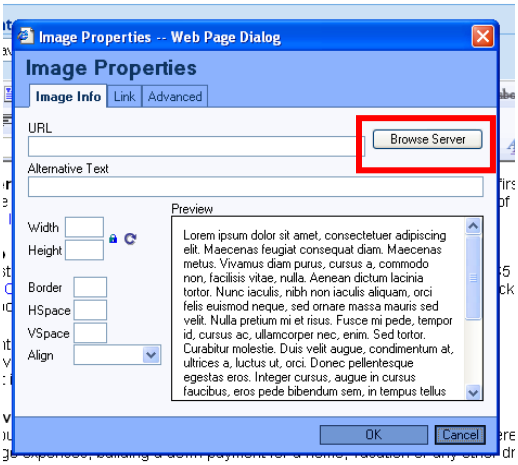
5. Format the new item if necessary. If you have moved the new item as a sub item (moved it right), the system will give it the same format as the parent. See page 23-24, items 3-6 for more information on how to format a sublist item.

6. Add spacing as needed. See above for information on spacing items within a numbered list.

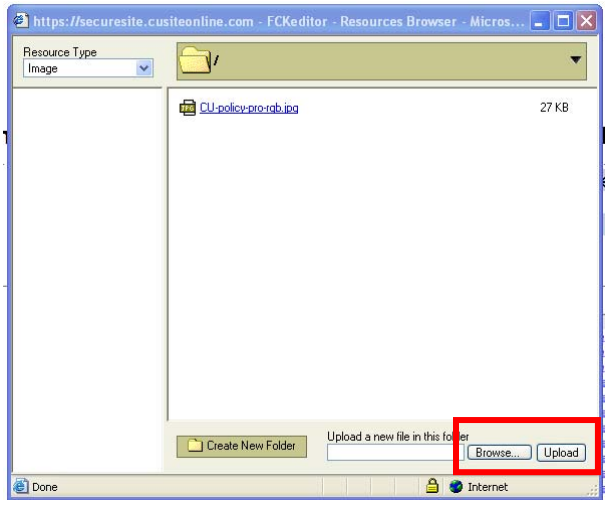
Inserting Graphics into a Policy

To insert a graphic:

1. Make sure your cursor is in the exact position where you want the graphic inserted.
2. Click the “Insert/Edit Graphic” icon.
3. A form will pop up giving you some options for your picture.
4. To upload your own image or access existing images in the image library, click the “Browse Server” button.

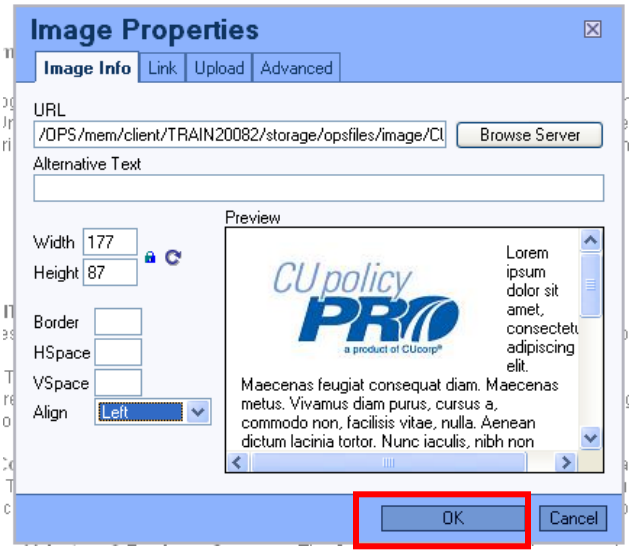


5. A new window will open showing a directory of all the images in the image library. To choose an image already in the library, click on the linked name of the image.
6. To upload a new image, use the “browse” button to find your image, then click the Upload button to add the image into the library. You can create new folders for ease of organizing and finding images.



7. Once you have clicked on the image to be inserted, you will be shown the image properties, as well as a preview box so you can see how the image will interact with your text based on the assigned properties.

8. When you have set your image properties, click OK to insert your image.



9. Using Image Properties. You can change image properties prior to inserting the image or after an image has been inserted. To change properties after the image in inserted, right click on the image and choose "Image Properties".

   Alternate Text: Used commonly on Web sites, this is descriptive text that is displayed by Web browsers when the picture has not yet been downloaded. Also, the description is recommended to assist those with sight disabilities.

   Width: the width (in pixels) of the image. The width can be changed, *however, the recommended method for changing an image size is to resize it using a photo program then re-uploading the image*.

   Height: the height (in pixels) of the image. The height can be changed, *however, the recommended method for changing an image size is to resize it using a photo program then re-uploading the image*.

   Border: Creates a box around the picture. The default is 0 (no border). The larger the number, the thicker the border appears.

   HSpace: Horizontal padding (in pixels) to the left and right of the picture. The larger the number, the larger the space.

   VSpace: Vertical padding (in pixels) to the left and right of the picture. The larger the number, the larger the space.

   Align: This aligns the photo relative to the text. Generally "Left" or "Right" create the best look on a Web page.

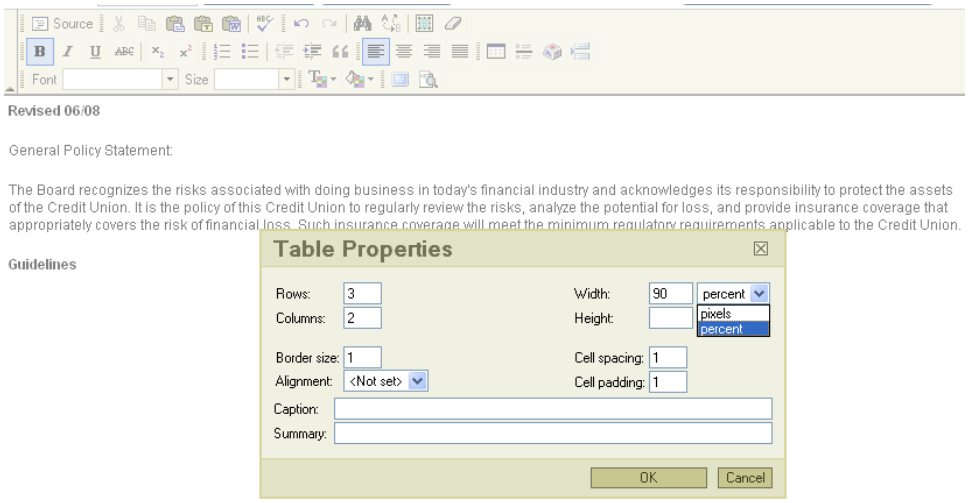
   Note: Your uploaded images will be stored (and are visible) in the Storage Area (file Opsfiles > Image). Do Not Delete these files from the Storage area or they will not be available for your manual! Images uploaded to this folder through the Storage area are also available when adding images to a page.

Inserting Tables

While tables are not used extensively in CU PolicyPro, they are a good tool to use for offsetting information, or displaying several text items side-by-side.

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.
4. When you have set your table options, click OK to insert your table.



5. Setting Table Properties. There are a number of properties that can be set in the Table Properties dialog box – the following is a list of those most commonly used.

   Rows: The number of rows for your table

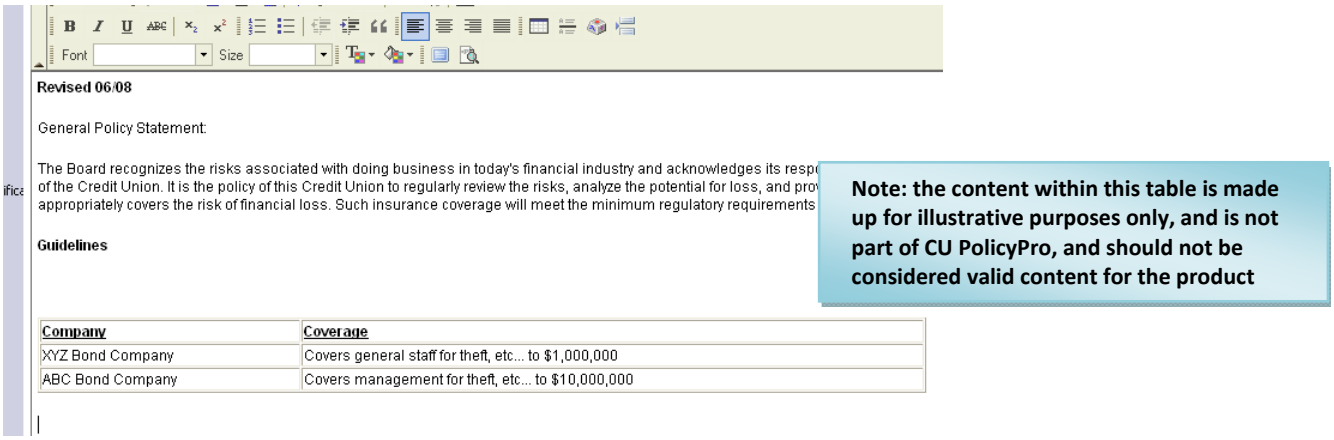
   Columns: The number of columns for your table

   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 the left, right or center of the page. If nothing is selected, default is “left”

   Width: The width of the entire table. **While the default is in pixels, we recommend changing this to percentage and setting the percentage to 100 or less.**

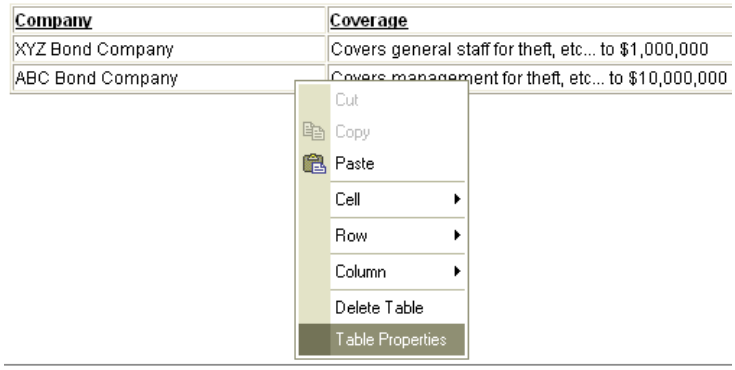
6. Once the table is inserted, place your mouse in any cell and type or copy/paste in your content. For copy/paste, it is recommend to paste as plain text. Any formatting that can be done on text can be done on text within the table.



Editing Tables

Once your table has been inserted, you can modify the entire table or just one of the table's cells.

1. Put your cursor within the table and right click the mouse to view the available options to manipulate cells, rows or columns.



2. 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.

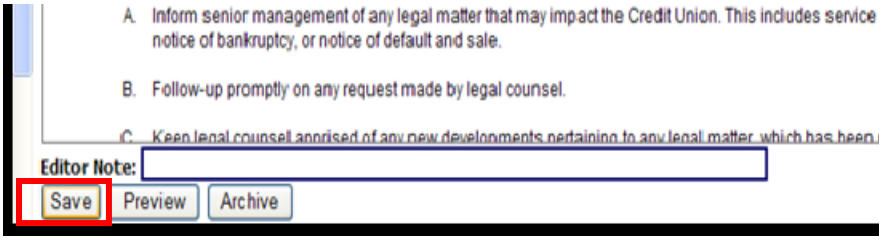
   Make sure you only set the width for one cell in each column, or you may get an unexpected result. Also, if setting widths for cells in multiple columns make sure the sum does not exceed 100%!

3. Use the "Row" option to add or remove rows. Place your cursor in a current row, and rows can be added above or below the current row.

4. Use the "Column" option to add or remove columns. Place your cursor in a current column, and columns can be added 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 #1 above).

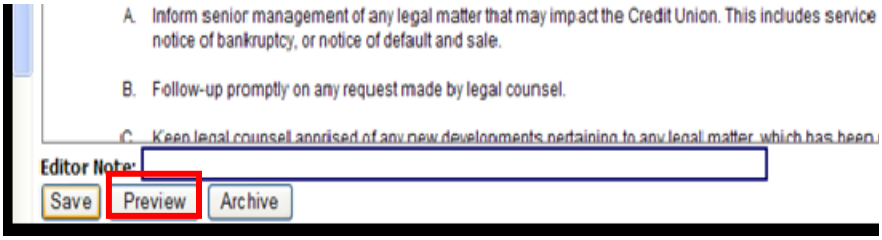
Saving Policy Edits

1. Once you have completed the edits and formatting for your policy and are happy with your changes, click the "Save" button directly below the content editor to save your work.



Previewing Policy Edits

1. Click the "Preview" Button directly below the content editor a to open a new window with a preview of how the policy will look when printed.



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 field, 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.

Printing a Single Policy from the Working Manual

1. Click the "Preview" Button directly below the content editor
2. A to open a new window with a preview of how the policy will look when printed
3. At the top of the preview window is a "Print" button that can be clicked to print this single policy.

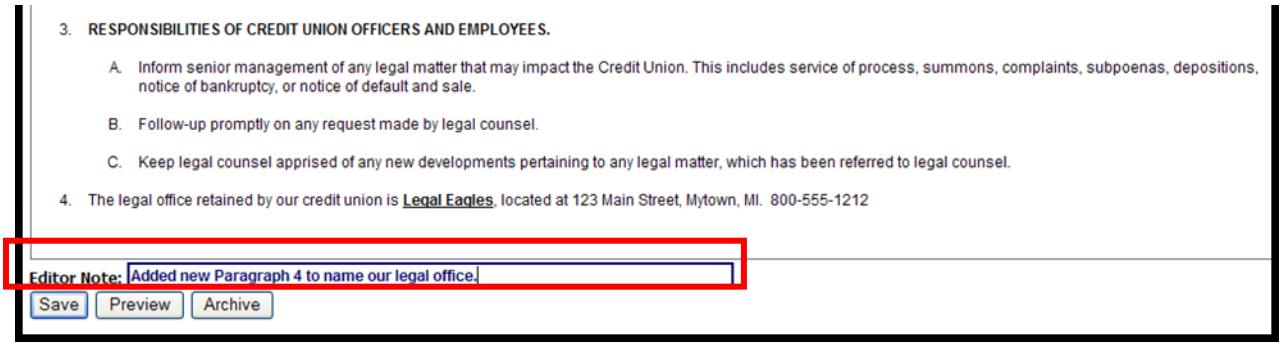
Using Editor Notes

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 55 for more information on the Policy Notes Report.

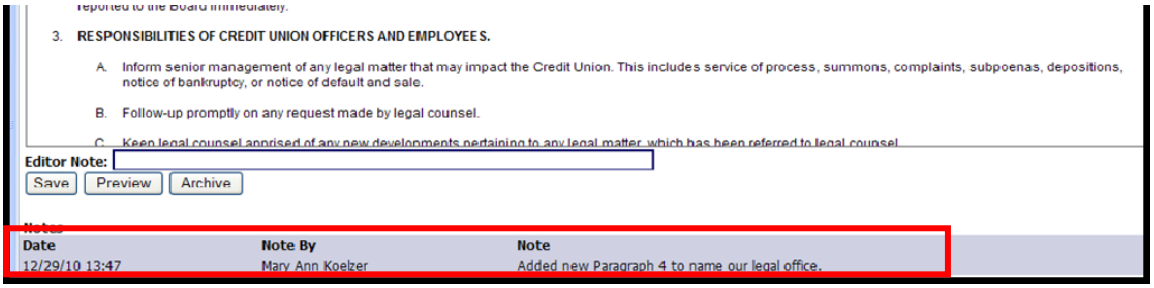
Editor notes can be used to document what has been customized for a particular policy, or to document who made certain updates or changes to a policy. Credit unions often use this documentation to determine how much custom content is included in any given policy versus the use of the model content.

1. To add an Editor Note, type in 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.



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.



Key Fields Content

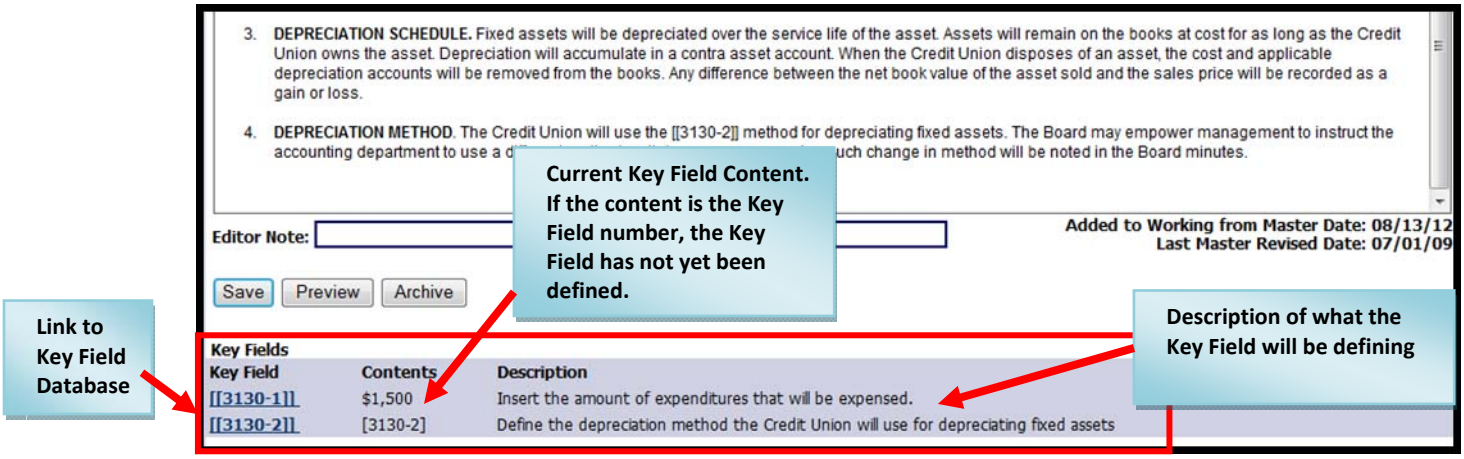
CU PolicyPro model policy content includes a series of *Key Fields* to assist with customization of the model policies. Key Fields are bits of information which are important to completing the policy, but will vary from credit union to credit union. An example of a Key Field would be the maximum amount allowable in a teller's drawer.

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 in the LIBRARY under "System Documentation".

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., [[2400–1]]). The first number of the Key Field correlates to specific policy numbers, making them 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.

Tip: if the "Contents" of the Key Field is the Key Field number, the Key Field has not yet been defined.

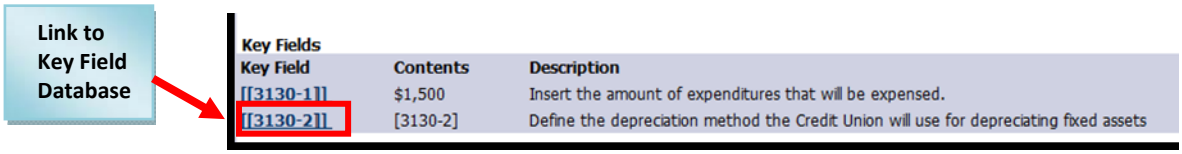


Defining Key Fields

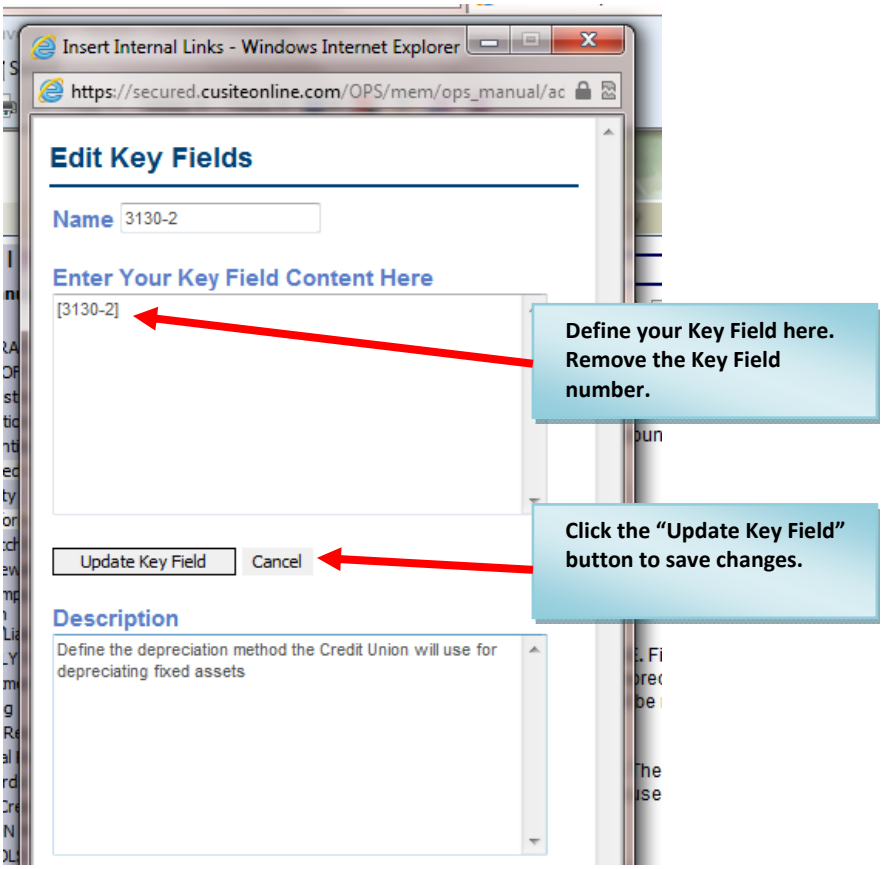
Key Fields can be defined one of two ways: At the individual policy level, which allows you to define the Key Fields for a single policy, or using the Multi-Key Fields Update, which allows you to define Key Fields for multiple polices at once.

Define Key Fields at the Individual Policy Level

1. Click on the "Working" link at the top right 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.



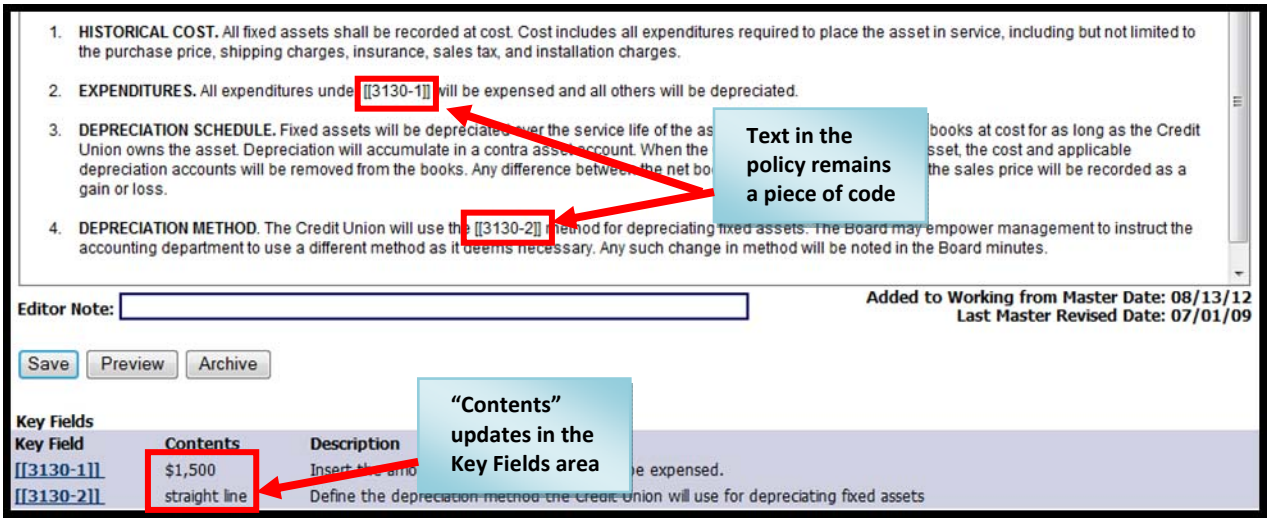
5. A pop up box will open. Define the Key Field in the box labeled "Enter Your Key Field Content Here" area of the dialog box. Remove the Key Field number as it is only an indicator that the Key Field has not yet been defined. If the Key Field number not removed, it will print as part of the policy.
6. Click the "Update Key Field" button to save your changes.

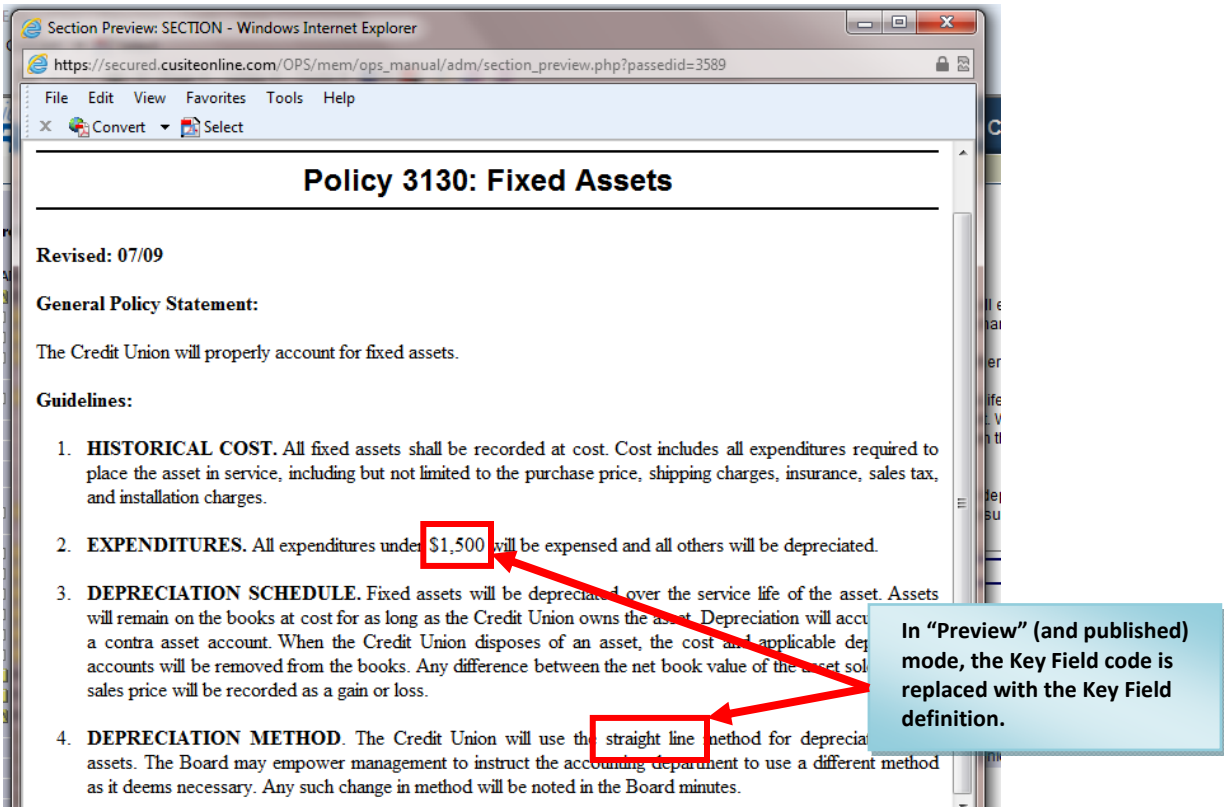


7. Once you have updated the Content of the Key Fields, the content will not show up until the page is refreshed. The easiest way to do this is to save the policy. **Until the page is refreshed, you will not see your content in the Key Fields area.**

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" button to see the Key Field replacement. Publishing the manual will also insert the correct text into the Key Field code area.





Define Key Fields directly in the Key Fields Database

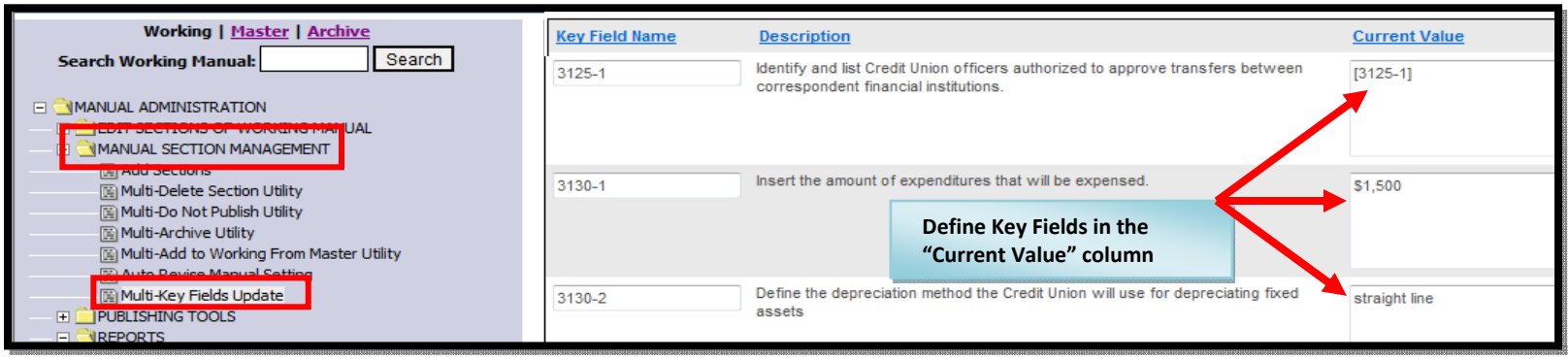
1. Click on the "Working" link at the top right of the screen to make sure you are in the *Working Manual*.

2. Using the plus signs to the left of each folder, expand the "Manual Administration" and the "Manual Section Management" folders.

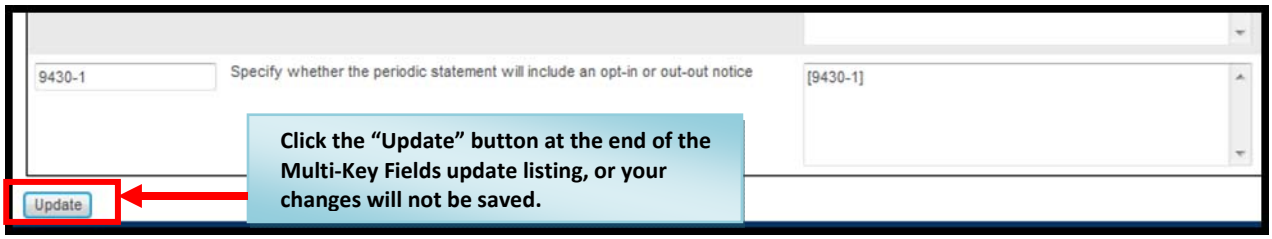
3. Click the "Multi-Key Fields Update" link under the "Manual Section Management" folder.

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 may 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 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.



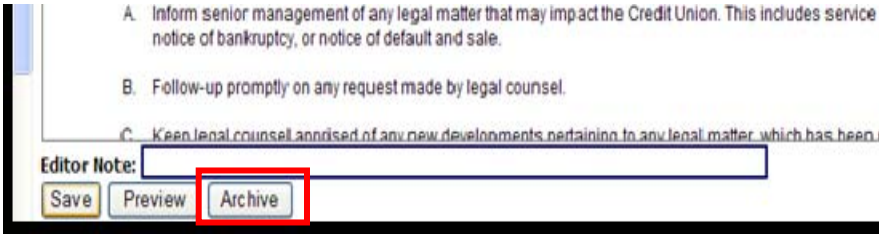
Archiving Policies

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 38-39 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" link at the top right 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 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.



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 credit union, 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 access at any time from the *Master Manual*. This will help keep your *Archive* area easier to maintain.

   Archive Tip #2: Many credit unions choose 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 recommend to 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

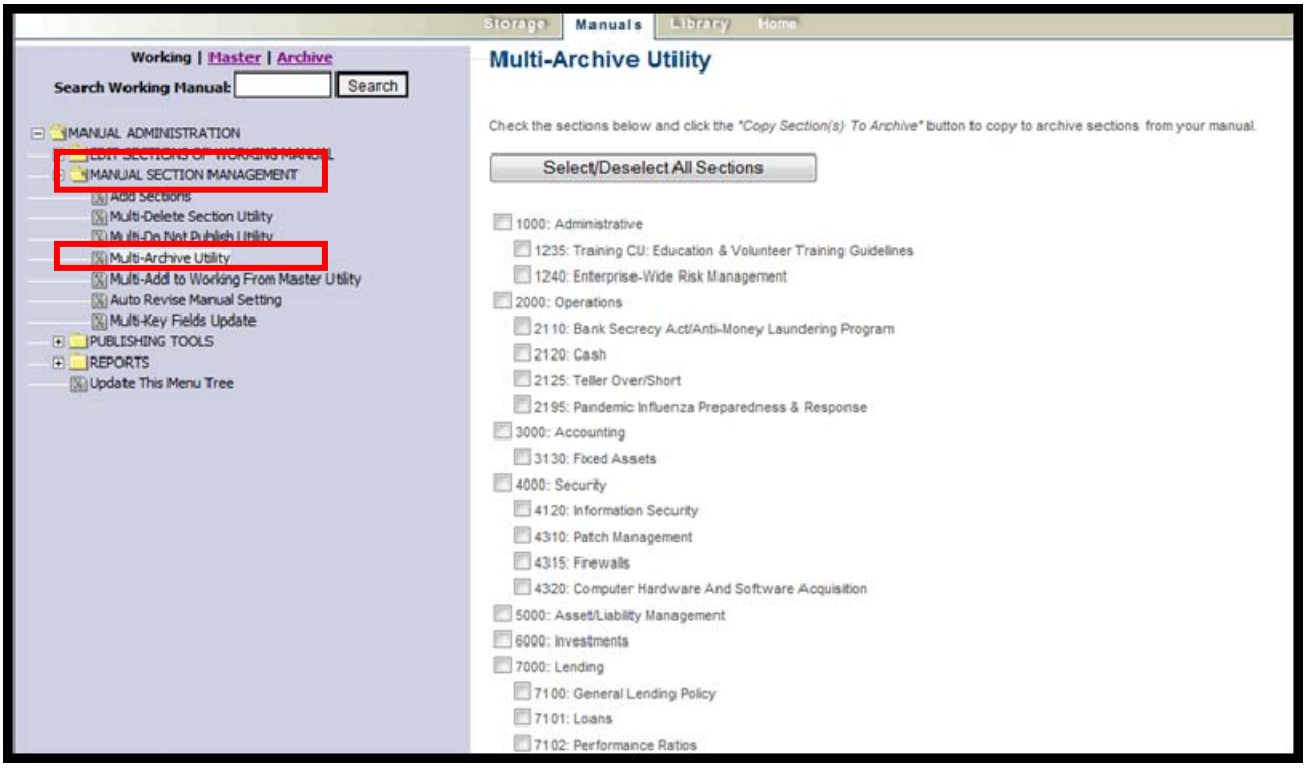
1. Click on the “Working” link at the top right of the screen to make sure you are in the *Working Manual*.

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.

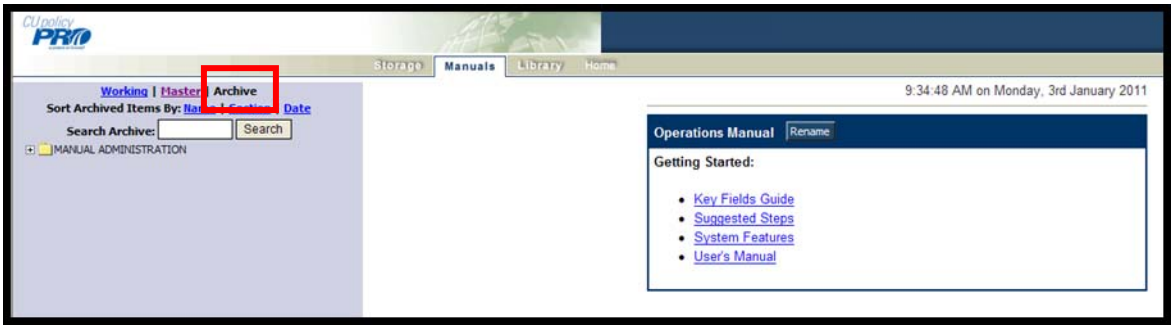
5. Click the checkbox next to each policy that you want to archive.



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

Accessing the Archive

To access the *Archive*, click on the “Archive” link at the top of the Manual Builder area.



1. Click on the “Archive” link at the top right of the screen to make sure you are in the *Archive*.

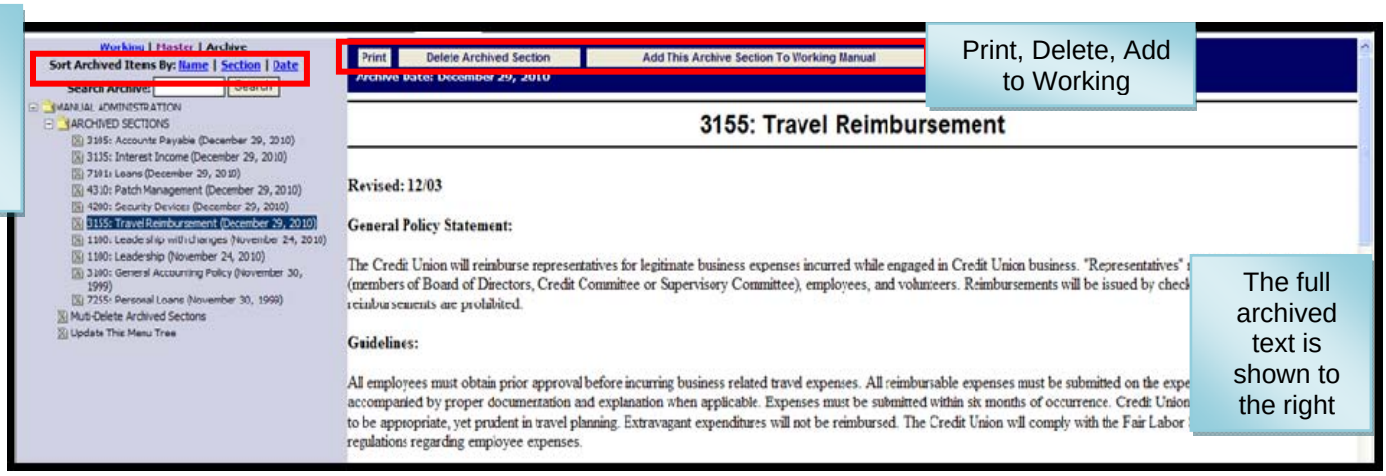
2. Using the plus signs to the left of each folder, expand the “Manual Administration” and the “Archived Sections” folders. A listing of all archived policies is available underneath the “Archived Sections” folder.

3. By default, the sort order is by date, with the most recently archived policies at the top of the list. You can change the sort order by clicking on the links directly below the link to the Archive, which allows sorting by Policy Number, Policy Name or Date.

4. 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.

5. 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*.

Choose the sort order to view the archived policies



Print, Delete, Add to Working

The full archived text is shown to the right

Un-Archiving a Policy

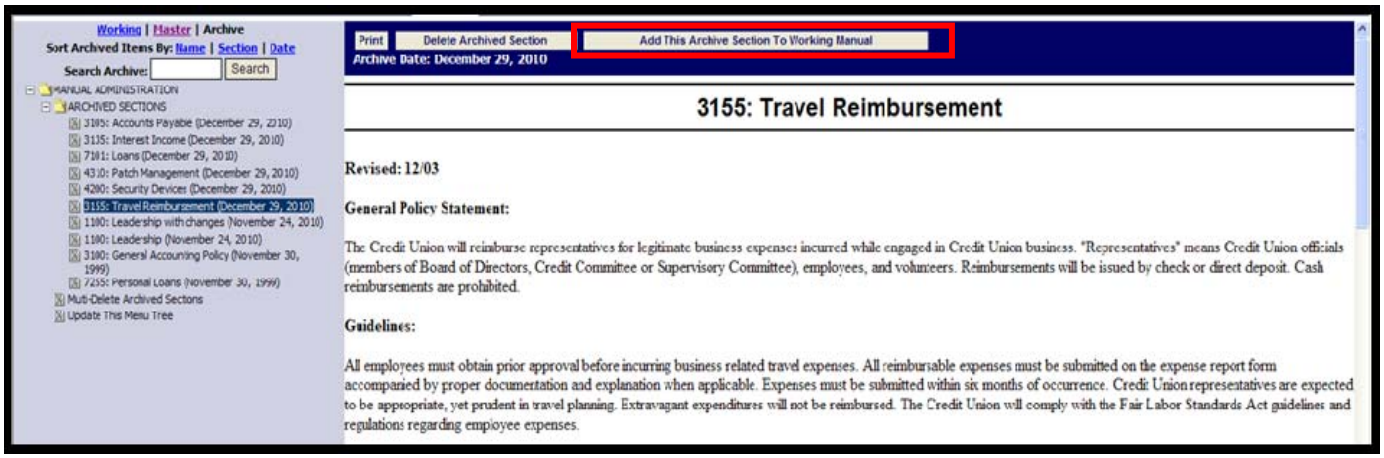
Tip: When un-archiving, be sure to first remove the unwanted policy version from your Working Manual (see page 42), then un-archive the proper version of the policy. Un-archiving a policy will not overwrite the policy in the *Working Manual*, but you will then have two policies (the correct and the incorrect) in your Working Manual.

1. Click on the "Archive" link at the top right of the screen to make sure you are in the *Archive*.

2. Using the plus signs to the left of each folder, expand the "Manual 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 to Working Manual" button, and the policy is now added back to your *Working Manual*.

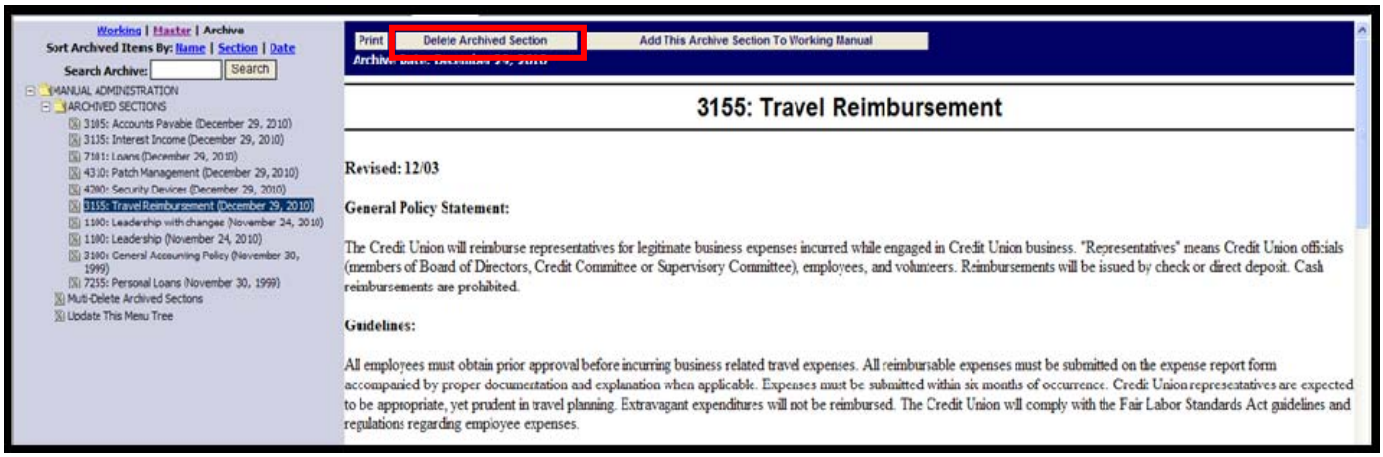


Deleting Archived Policies

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.

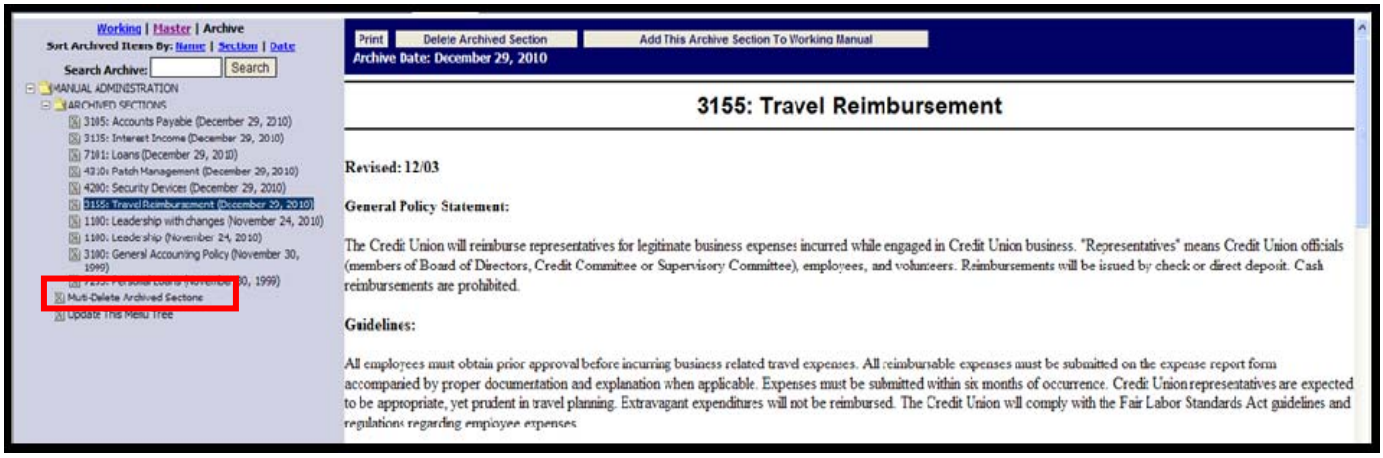
Deleting an Single Archived Policy at the Archived Policy Level

1. Click on the “Archive” link at the top right of the screen to make sure you are in the *Archive*.
2. Using the plus signs to the left of each folder, expand the “Manual 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 Policy at one Time

1. Click on the “Archive” link at the top right of the screen to make sure you are in the *Archive*.
2. Using the plus signs to the left of each folder, expand the “Manual 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.



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.

Removing Policies from the Working Manual

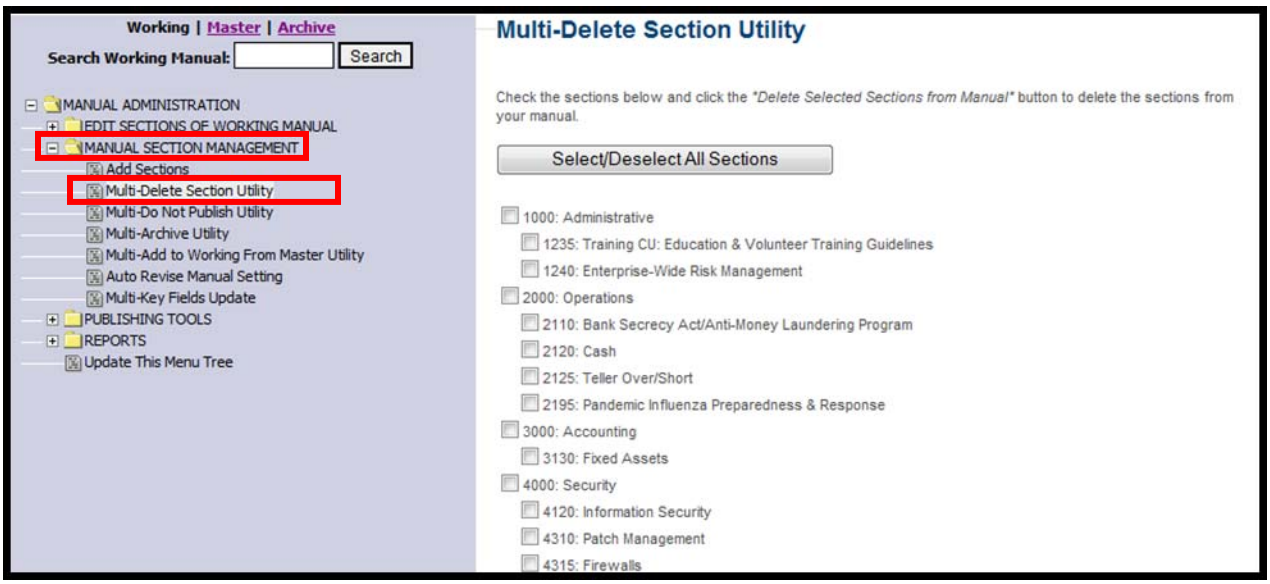
1. Click on the “Working” link at the top right of the screen to make sure you are in the *Working Manual*.

2. Using the plus signs to the left of each folder, expand the “Manual Administration” and the “Manual Section Management” folders.

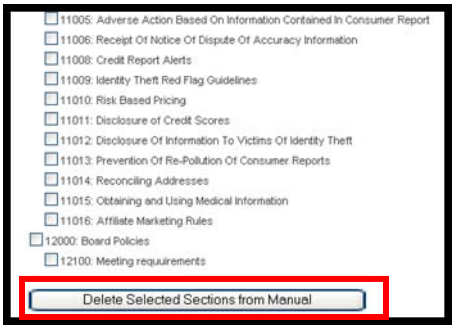
3. Click on the “Multi-Delete Section Utility” link in the “Manual Section Management” folder.

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 that you want to remove.



6. Scroll to the end of the page and click the “Delete Selected Sections from Manual” button.



7. A confirmation box will pop up, and once confirmed, the selected policies will be removed from your *Working Manual*.

8. Policies that are removed by mistake can be restored by the CU PolicyPro support staff. Contact hrsupport@cusolutionsgroup.com for assistance.

Note: To delete an entire chapter, you must check <u>all</u> the policies within that chapter. Deleting just the chapter folder (1000, 2000 etc.) will only delete only that chapter page, not all the policies within the chapter. If a top level chapter page is deleted, any policies within that chapter will no longer be accessible for editing in the *Working Manual*. They will, however, appear in the published manual.

Auto Revise Manual Setting

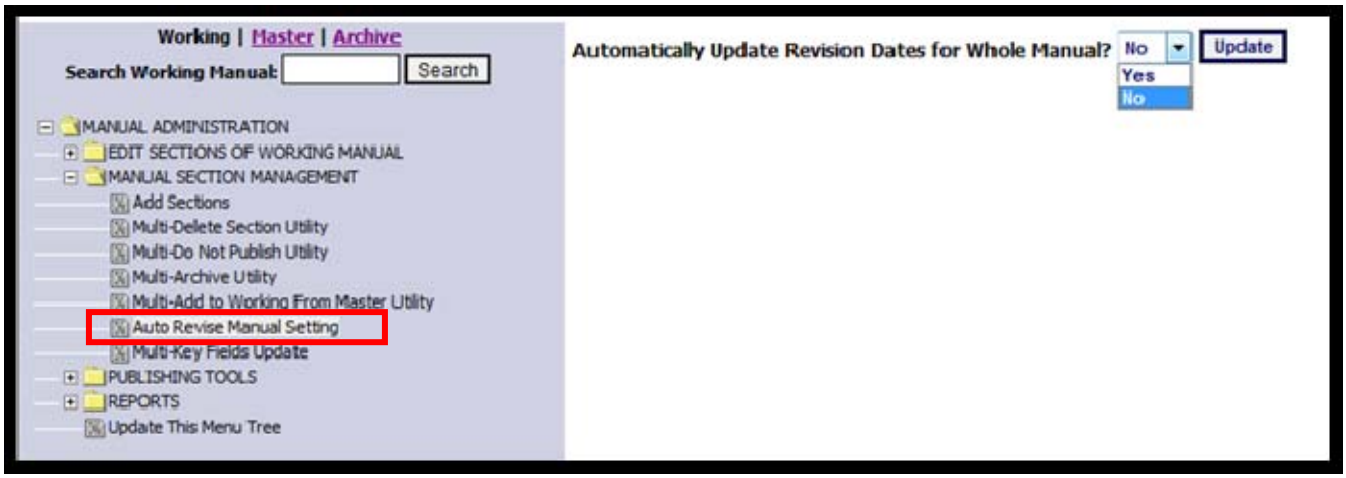
The “Auto Revise Manual Settings” tool allows you to automatically check or uncheck the “**Auto Update Revised Date**” button across all sections of the working manual.

This is the button found in the Toolbar when you are editing a policy:

When this button is checked, clicking the “Save” buton for that policy will insert the current date into the “Revised” field. If the button is not checked, you will need to manually insert a date if you want one in the “Revised” field.

To check the box in every policy in your working manual, change the dropdown under “Auto Revise Manual Settings” to “Yes” and click “Update”.

To un-check the box in every policy in your working manual, change the dropdown under “Auto Revise Manual Settings” to “No” and click “Update”.



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 "Do Not Publish" settings
2. Publish the Manual.

The "Do Not Publish" Setting

For any given publish, the system will publish all policies in the *Working Manual*. Policies can be excluded from the published version by using the "Do Not Publish" Setting. The "Do Not Publish" Setting is a checkbox found in the Toolbar area of each policy.

Important Note! The "Do Not Publish" Setting works differently for policies and for chapter pages.

If the "Do Not Publish" Setting box is checked on a **specific policy**, the policy will be **excluded** from any subsequent published versions until the setting is changed. Once checked, the "Do Not Publish" Setting will not change unless manually unchecked.

If the "Do Not Publish" Setting box is checked on a **chapter page**, all policies in the entire chapter will be **excluded** from any subsequent published versions until the setting is changed. Once checked, the "Do Not Publish" Setting will not change unless manually unchecked. The chapter page "Do Not Publish" setting effectively overrides the individual policy settings within the chapter. This makes it easy to exclude an entire chapter from the publishing process.

The "Do Not Publish" Setting can be applied either to specific policies or chapter pages in one of two ways: At the individual policy level, which allows you exclude a single policy or chapter page, or using the Multi-Do Not Publish Utility, which allows you to exclude multiple polices and/or chapter pages at once.

Setting a Single Policy or Chapter Page to "Do Not Publish"

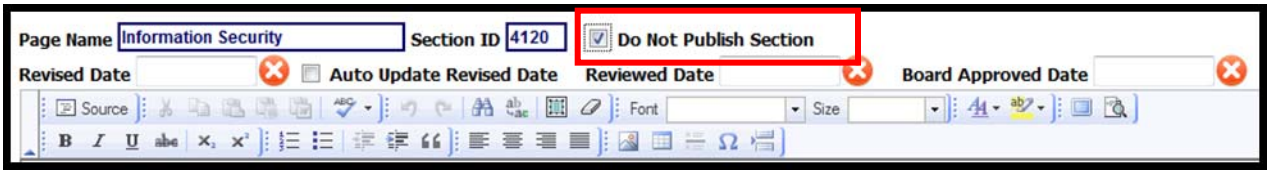
1. Click on the "Working" link at the top right of the screen to make sure you are in the *Working Manual*.

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 the policy or chapter page you wish to set to "Do Not Publish".

4. Check the “Do Not Publish Setting” checkbox, and the policy or chapter page will be excluded from publishing. This setting will be retained until it is manually unchecked. Remember that if the chapter page is set to “Do Not Publish”, 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 Multiple Policies and/or Chapter Pages to “Do Not Publish”

1. Click on the “Working” link at the top right 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-Do Not Publish 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. If any policy or chapter page has previously been set to “Do Not Publish”, the checkboxes next to those policies/chapter pages will already be checked.

6. Review the current settings for each policy/chapter page, and make anything you want excluded from the publish has been checked. Remember that if the chapter page is set to “Do Not Publish”, it will exclude all of the policies in the chapter from publishing, regardless of the individual policy settings.

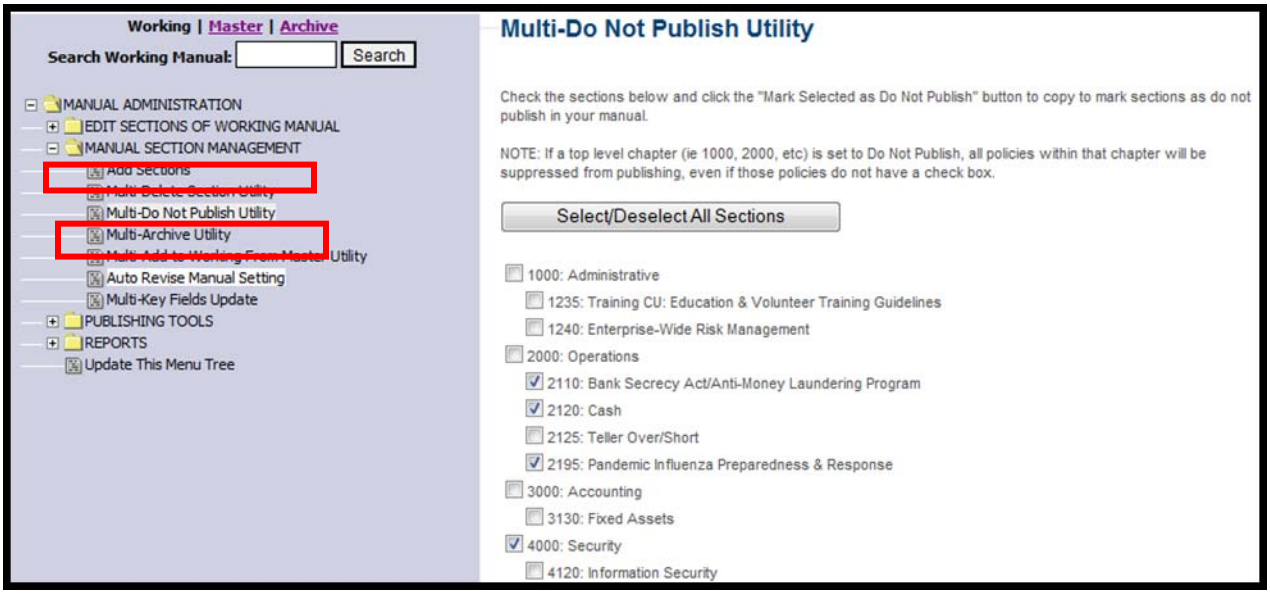
   In the screen shot example (see next page), for chapters 1000-4000, the following settings have been applied:

   - Chapter 1000 – The chapter page (1000) is unchecked, and all individual policies are unchecked. Therefore, all policies from Chapter 1000 will be included in the publish.

   - Chapter 2000 - The chapter page (2000) is unchecked, three of the four policies are checked. Therefore, the three checked policies will be excluded from the publish, and policy 2125 will be included in the publish.

   - Chapter 3000 – The chapter page (3000) is unchecked, and all individual policies are unchecked. Therefore, all policies from Chapter 3000 will be included in the publish.

   - Chapter 4000 – The chapter page (4000) is checked, and all individual policies are unchecked. Therefore, because the top level chapter page 4000 has been checked, it will override the individual policy settings and all policies from Chapter 4000 will be excluded from the publish.



7. Once you have reviewed and adjusted the “Do Not Publish” setting for all policies/chapter pages, scroll to the end of the page and click the “Mark Selected as Do Not Publish” button.

   Note: if you change the setting for a policy in using the “Multi-Do Not Publish Utility”, that setting will be retained until it is manually changed.

Publishing the Working Manual

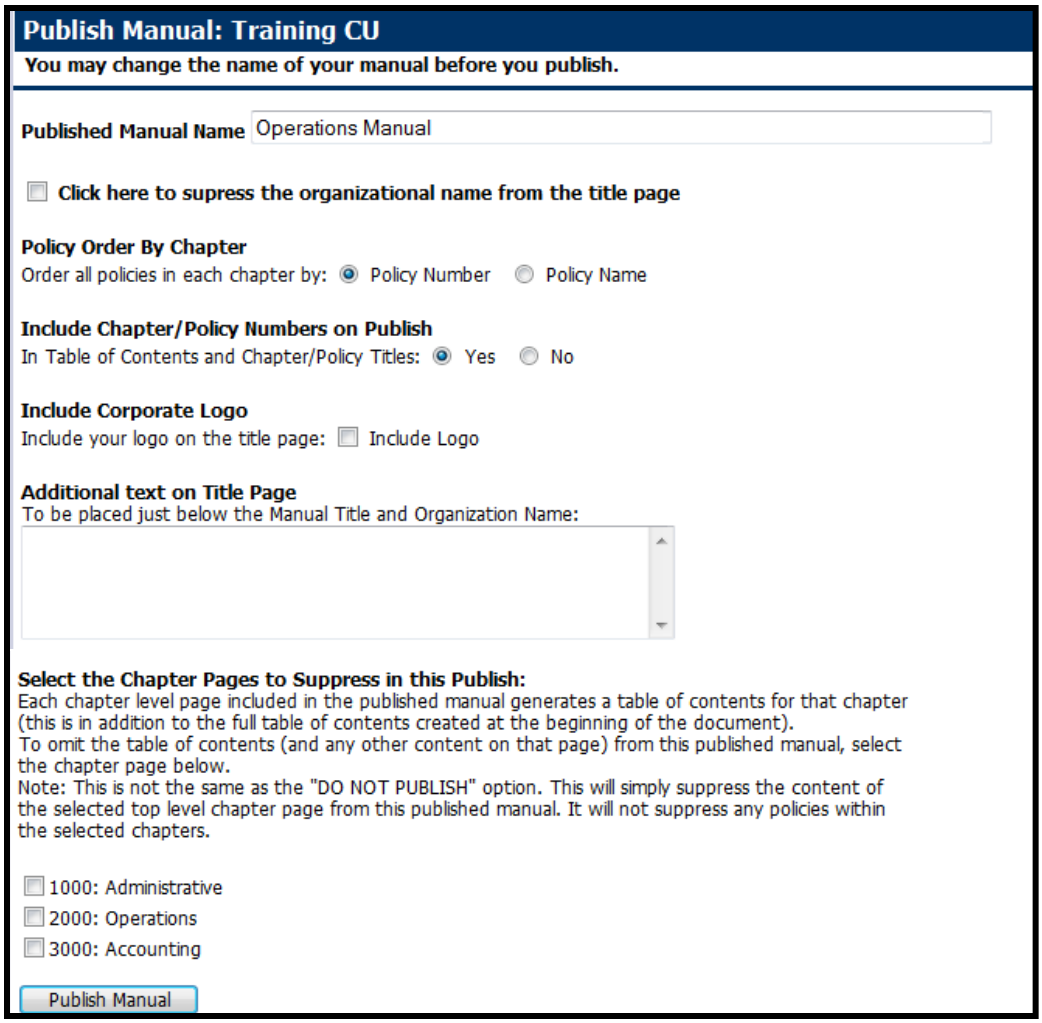
Before publishing, you should ensure that all “Do Not Publish” settings have been applied. See previous section for more information.

1. Click on the “Working” link at the top right 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 next page for a screen shot of the options and an explanation of each.



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. Be specific when titling your manual (i.e. Security & ALM Policies, Policies for Board Review on 11-15-12, Complete Operations Policy Manual, 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 credit unions 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 64 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. Example: These policies are for review only and are not yet board approved.

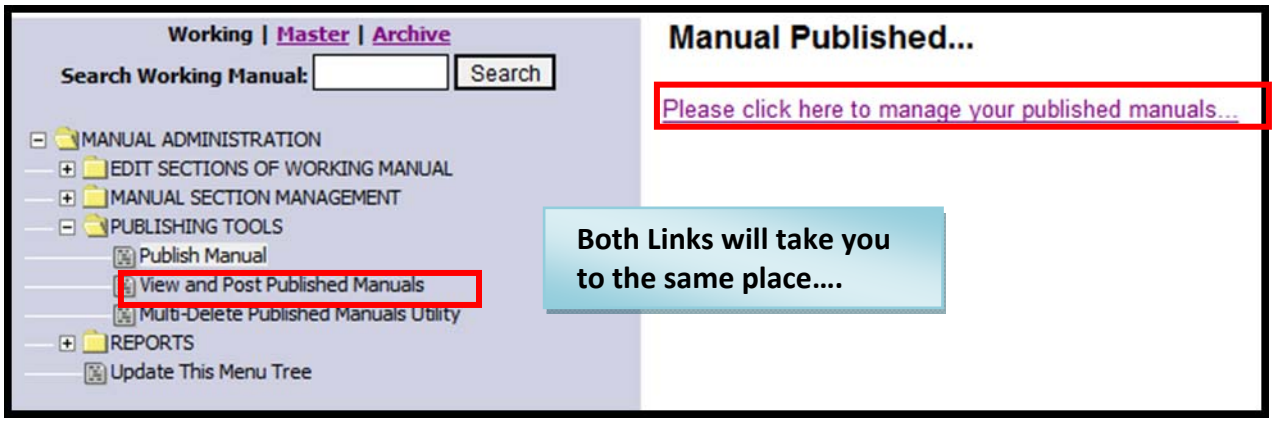
Select the Chapter Pages to Suppress in Publishing: This setting allows any or all Chapter page content included in the publish to be excluded from the document. This is not the same thing as DO NOT PUBLISH. A top level Chapter page ***must*** be included in the publish in order for any policies within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

5. Once you have chosen all your options, click the "Publish Manual" button.

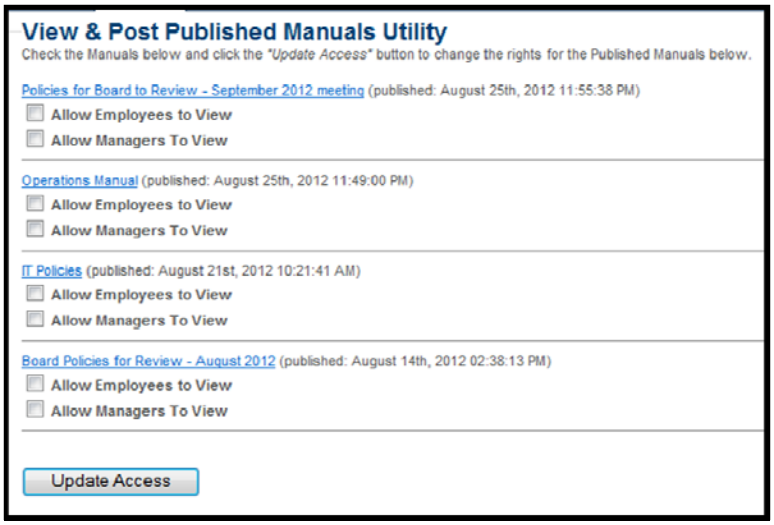
6. Once you have published, a message will appear that the publish may take several minutes. Click OK.

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

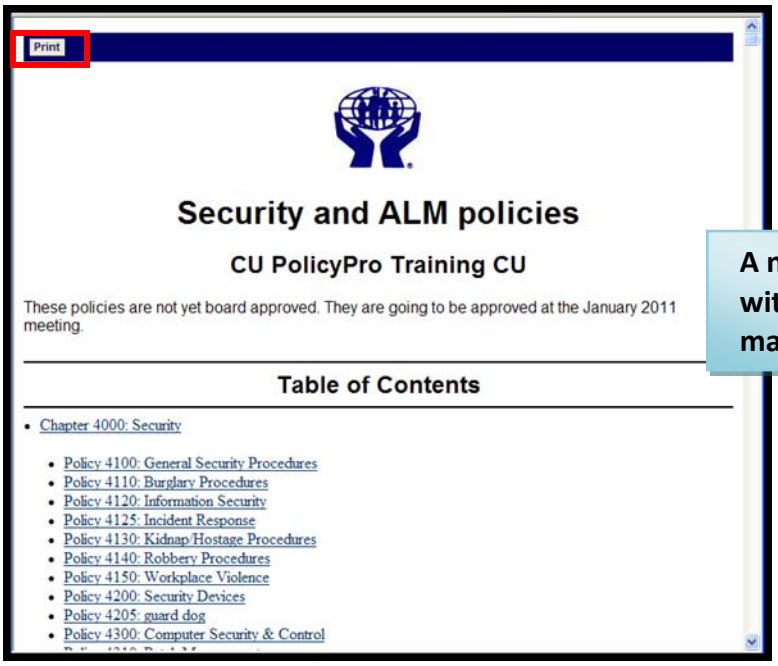
The “View and Post Published Manuals” area lists all published manual versions in date order, with the most recently published version at the top of the list. Published manuals can be viewed, printed, and posted on the Home Page of CU PolicyPro for staff to access.



Viewing and Printing a Published Manual

1. To view or print a published manual, click on the link (the name) of the published manual. This will open a new window showing the content of that published manual.

2. To print the manual, click on the "Print" button in the top left to print the published manual.



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 credit union with a CU PolicyPro 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 CU PolicyPro users from the credit union and does need to also be placed in the "Manager Manuals" folder.

2. Click the "Update Access" button when finished.

Removing Published Manuals on 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” button when finished.

Deleting Published Manuals

1. Click on the “Working” link at the top right 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.

Printing Tips

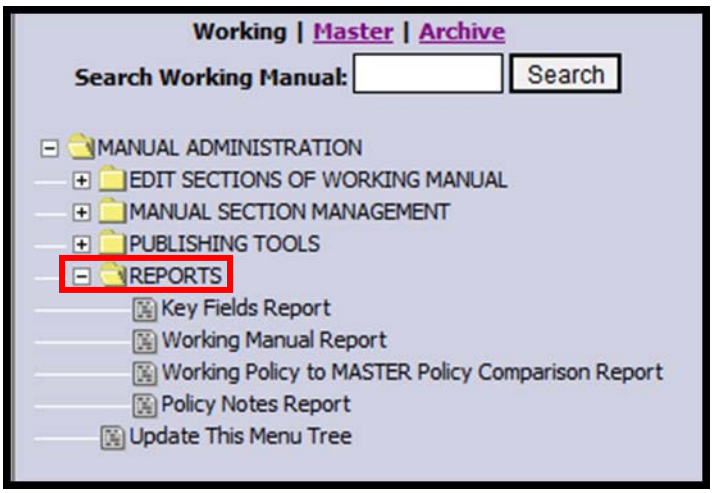
See Appendix A and Appendix B for printing tips.

Reports

A series of reports are available to help you better manage your policies. All reports are read only.

To access reports:

1. Click on the “Working” link at the top right 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 “Reports” folders.
3. Click on report you want to review.
4. The report information will appear on the right side of the screen. Note: dates for policy activity in the Working Manual are not available prior to November 2010. For clients who have been working with CU PolicyPro since before November 2010, some report functionality may not be available.
5. Reports are described in detail in the following sections of the User’ Guide.



Key Fields Report

- The “Key Fields Report” is a quick view all of how all the Key Fields in the system have been defined.
- Scrolling your mouse through the list will show you the description for the Key Field and any text you may have entered to define that Key Field.
- Click on “Print Report” for a printed copy.

Working Manual Report

- The Working Manual Report will show key dates for all of the policies in the Working Manual, including the "Last Saved", "Revised", "Reviewed", "Board Approved", "Added to Working from Master" and "Master Revised" dates. ***Note: "Last Saved" and "Added to Working from Master" dates are not available for any activity prior to November 24, 2010***

- Clicking on any column heading will re-sort the list by the information in the selected column.

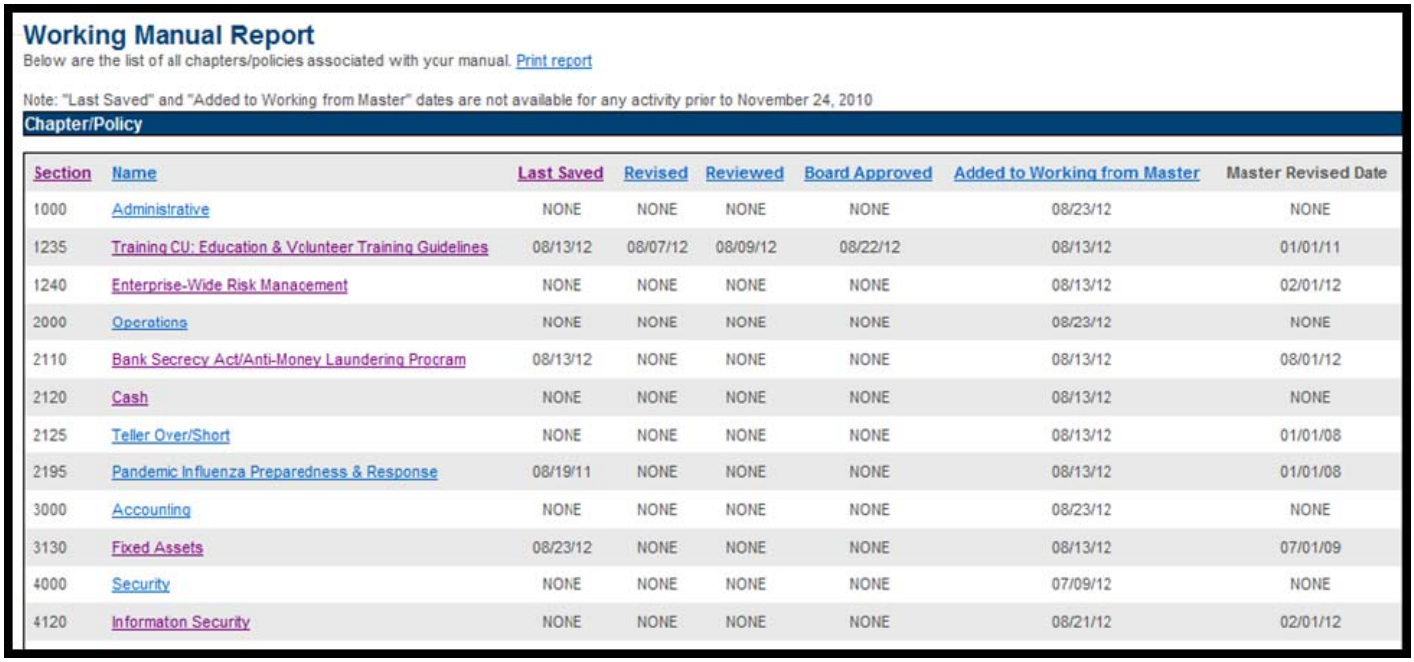
  - **Last Saved.** This is a date stamp from the last time someone clicked "Save" while in the policy. If this date = NONE, then the policy has never been saved since being added to the Working Manual, which indicates that no customization has been done. (Exception – if the policy was last saved prior to November 2010, the date would indicate NONE)

  - **Revised/Reviewed/Board Approved**. These date fields are set at the individual policy level by the policy editor. If the date = NONE, it has not been set or is not being used by the policy editor.

  - **Added to Working from Master**. This is the date the model policy was copied from the *Master Manual* into the *Working Manual*. "Added to Working from Master" date is often reviewed in conjunction with the "Master Revised Date" (see below). If this date = NONE, it indicates that either the policy was moved into the Working prior to November 2010, or the policy was as a blank policy, and was not copied from the *Master*.

  - **Master Revised Date**. This indicates the date of the last revision to the model policy content in the *Master Manual*. "Master Revised Date" is often reviewed in conjunction with the "Added to Working from Master" date. If the "Added to Working from Master" date is prior to the "Master Revised" date, it simply indicates that an update was made to the model content after that model policy was copied to the *Working Manual*. Since model content updates are not automatically added to the *Working Manual*, it would be up to the credit union to incorporate applicable updates to their own policy. Using the dates can help identify specific policies that may require revision. If this date = NONE, it indicates that either there is no *Master Manual* version for this policy number, or the *Master Manual* version has not had a revision in 10+ years.

    Note: if a credit union creates a unique policy with the same policy number as a *Master Manual* policy, the "Master Revised Date" will still appear as it is based on the policy number, and not the title or the content of the policy.



Working Manual Report

Below are the list of all chapters/policies associated with your manual. Print report

Note: "Last Saved" and "Added to Working from Master" dates are not available for any activity prior to November 24, 2010

Chapter/Policy

Section	Name	Last Saved	Revised	Reviewed	Board Approved	Added to Working from Master	Master Revised Date
1000	Administrative	NONE	NONE	NONE	NONE	08/23/12	NONE
1235	Training CU: Education & Volunteer Training Guidelines	08/13/12	08/07/12	08/09/12	08/22/12	08/13/12	01/01/11
1240	Enterprise-Wide Risk Management	NONE	NONE	NONE	NONE	08/13/12	02/01/12
2000	Operations	NONE	NONE	NONE	NONE	08/23/12	NONE
2110	Bank Secrecy Act/Anti-Money Laundering Program	08/13/12	NONE	NONE	NONE	08/13/12	08/01/12
2120	Cash	NONE	NONE	NONE	NONE	08/13/12	NONE
2125	Teller Over/Short	NONE	NONE	NONE	NONE	08/13/12	01/01/08
2195	Pandemic Influenza Preparedness & Response	08/19/11	NONE	NONE	NONE	08/13/12	01/01/08
3000	Accounting	NONE	NONE	NONE	NONE	08/23/12	NONE
3130	Fixed Assets	08/23/12	NONE	NONE	NONE	08/13/12	07/01/09
4000	Security	NONE	NONE	NONE	NONE	07/09/12	NONE
4120	Informaton Security	NONE	NONE	NONE	NONE	08/21/12	02/01/12

Working Policy to MASTER Policy Comparison Report

- This report compares the content in all Working Manual policies to the content in the Master Manual. This is based on policy number – if the policy number exists in the *Working Manual,* the report will compare it to the policy in the *Master Manual* with the same number. This report is generally used to indicate if the most current version of a model policy is included in the *Working Manual*, but has not been customized at all.

- This report will simply display if the content matches or not. It does not give any additional information about what the differences are.

- Content that does not match could be the result of customization by the credit union, updates to the master that have not been incorporated into the *Working Manual*, or a combination of both.

- Note: if a credit union creates a unique policy with the same policy number as a *Master Manual* policy, the report will compare it with the *Master Manual* model policy as it is based on the policy number, and not the title or the content of the policy.

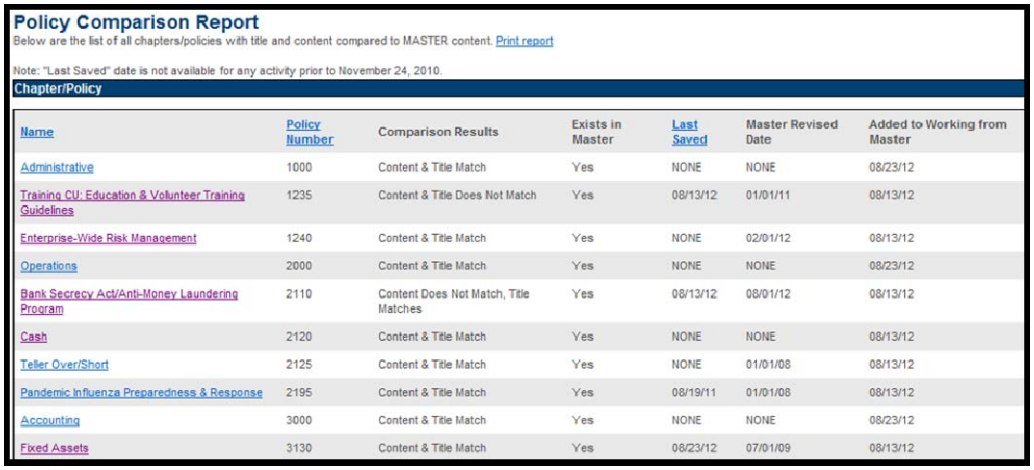
    - **Comparison Results.** This will compare the title of the Working Manual policy to the title of the model policy in the master, and compare the body of the content. The result will indicate if the policy title matches, and whether or not the content matches. The comparison looks for an exact match, so even if there is one minor difference in the content, the report will indicate that the content does not match.

    - **Exists in Master.** This field indicates if the policy number exists and has been assigned to a model policy in the *Master Manual*.

    - **Last Saved.** This is a date stamp from the last time someone clicked "Save" while in the policy. If this date = NONE, then the policy has never been saved since being added to the Working Manual, which indicates that no customization has been done. (Exception – if the policy was last saved prior to November 2010, the date would indicate NONE). If the "Last Saved" date = NONE and the content does not match, it generally indicates that the model content version in the Working Manual is not the most current model content.

    - **Master Revised Date**. This indicates the date of the last revision to the model policy content in the *Master Manual*. If this date = NONE, it indicates that either there is no *Master Manual* version for this policy number, or the *Master Manual* version has not had a revision in 10+ years. The "Master Revised Date" can be used in conjunction to the "Last Saved" and "Added to Working from Master" dates to help determine if all updates are included in the policy.

    - **Added to Working from Master**. This is the date the model policy was copied from the *Master Manual* into the *Working Manual*. "Added to Working from Master" date is often reviewed in conjunction with the "Master Revised Date" and "Last Saved" date to help determine if the all updates have been added to the policy. If this date = NONE, it indicates that either the policy was moved into the Working prior to November 2010, or the policy was as a blank policy, and was not copied from the *Master*.



Policy Comparison Report

Below are the list of all chapters/policies with title and content compared to MASTER content. Print report

Note: "Last Saved" date is not available for any activity prior to November 24, 2010.

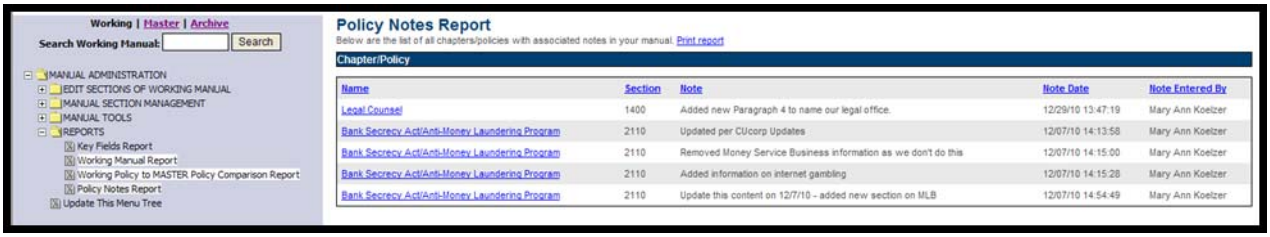
Chapter/Policy

Name	Policy Number	Comparison Results	Exists in Master	Last Saved	Master Revised Date	Added to Working from Master
Administrative	1000	Content & Title Match	Yes	NONE	NONE	08/23/12
Training CU: Education & Volunteer Training Guidelines	1235	Content & Title Does Not Match	Yes	08/13/12	01/01/11	08/13/12
Enterprise-Wide Risk Management	1240	Content & Title Match	Yes	NONE	02/01/12	08/13/12
Operations	2000	Content & Title Match	Yes	NONE	NONE	08/23/12
Bank Secrecy Act/Anti-Money Laundering Program	2110	Content Does Not Match, Title Matches	Yes	08/13/12	08/01/12	08/13/12
Cash	2120	Content & Title Match	Yes	NONE	NONE	08/13/12
Teller Over/Short	2125	Content & Title Match	Yes	NONE	01/01/08	08/13/12
Pandemic Influenza Preparedness & Response	2195	Content & Title Match	Yes	08/19/11	01/01/08	08/13/12
Accounting	3000	Content & Title Match	Yes	NONE	NONE	08/23/12
Fixed Assets	3130	Content & Title Match	Yes	08/23/12	07/01/09	08/13/12

Policy Notes Report

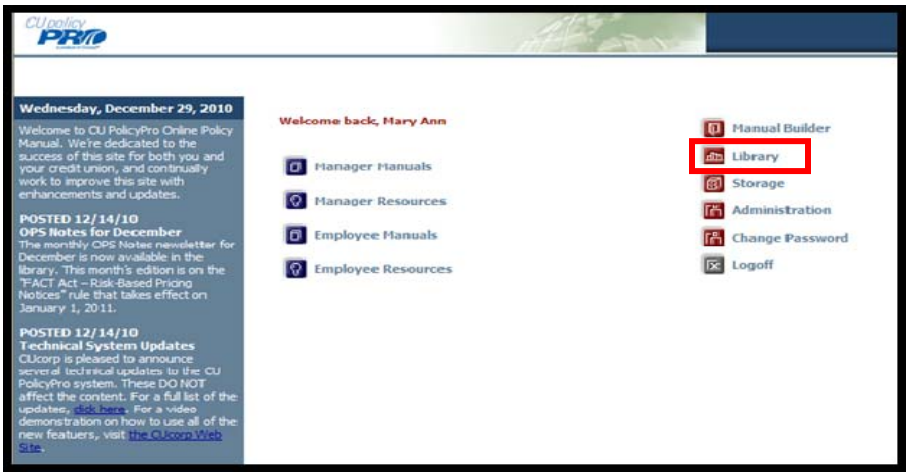
The Policy Notes Report will show all notes for all policies in the Working Manual.

Clicking on any column heading will re-sort the list by the information in the selected column.



Library

Click on “Library” in the right hand navigation of the *Home Page* to access the CU PolicyPro Library. This is a “read only” area where you can find information and tools.



The Library is divided into four sections:

1. **Notes**. This contains an archive of the past several years’ worth of the monthly *OPS Notes* newsletters.

2. **Tools.** The *Tools* area provides additional resources such as sample forms and definitions.

3. **Updates.** CU PolicyPro is updated semi-annually. New policies are added and revisions to existing text are made. Past Updates are stored in this tab for your review. Older updates are periodically purged from the *Updates* tab.

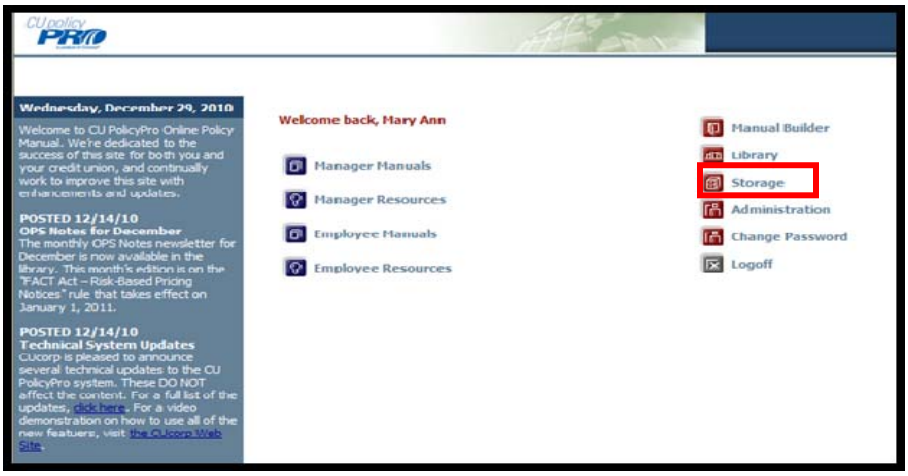
4. **System Documentation**. The User's Guide and other documentation to help you get the most out of your manual.

To access any of the items in the *Library*, simply click on the name of the folder (or the plus/minus sign to the left of the folder), and click on the item you want to view. The item will open in a new window.

Tip: clicking on the folder icon itself will not expand or contract the folder – you must click on the folder name or the plus/minus sign next to it.

Storage

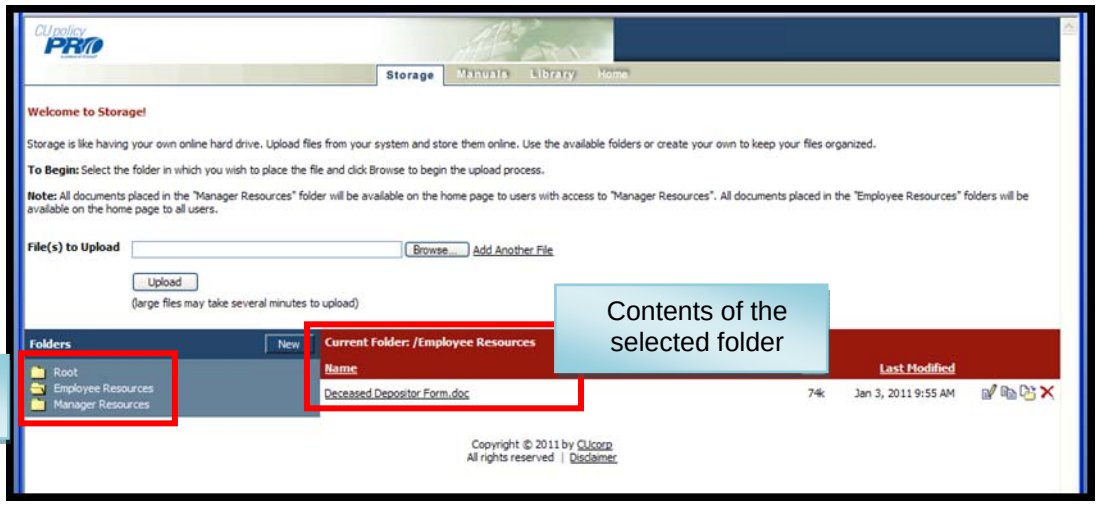
Click on “Storage” in the right hand navigation of the *Home Page* to access the Storage Area.



The Storage area allows you to upload and store documents. Once in storage, document can be posted to the Home Page, either in the “Manager Resources” or “Employee Resources” folder.

Storage File Structure

1. By default, the Storage area contains three folders: “Root”, “Employee Resources”, and “Manager Resources”.
2. Clicking on the folder name and the contents of that folder will be displayed in the center section of the screen.



3. The “Employee Resources” and “Manager Resources” folders serve a special function. Any documents placed in these folder will be posted to the corresponding folders on the *Home* page.

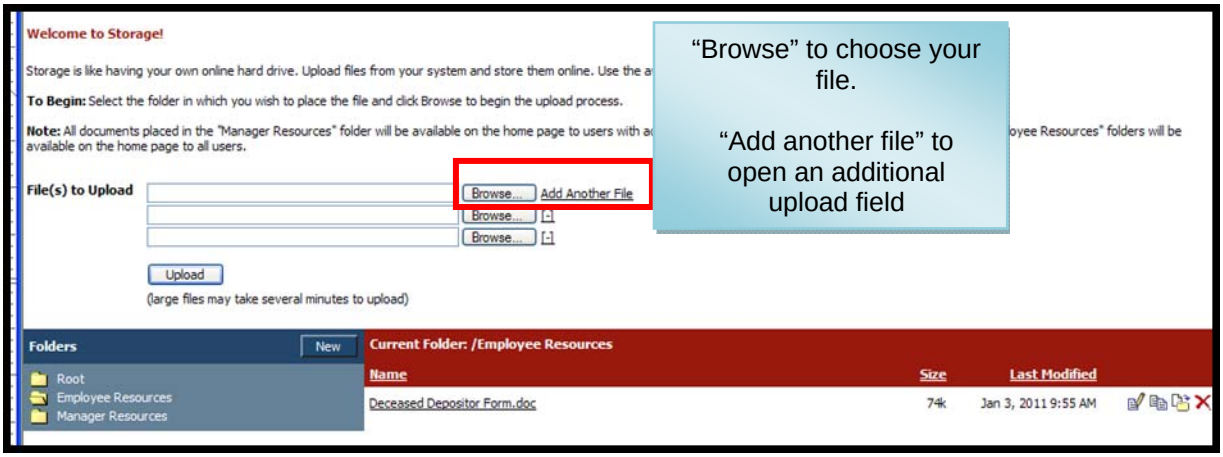
4. Additonal folders can be created by clicking the “New” button next to the Folder listing. You can create subfolders to existing folders. Subfolders and their contents are available from the Storage area, but will not be posted on the home page, even if the subfolders are created within the Employee Resources” or “Manager Resources” folders

Uploading Files to Storage

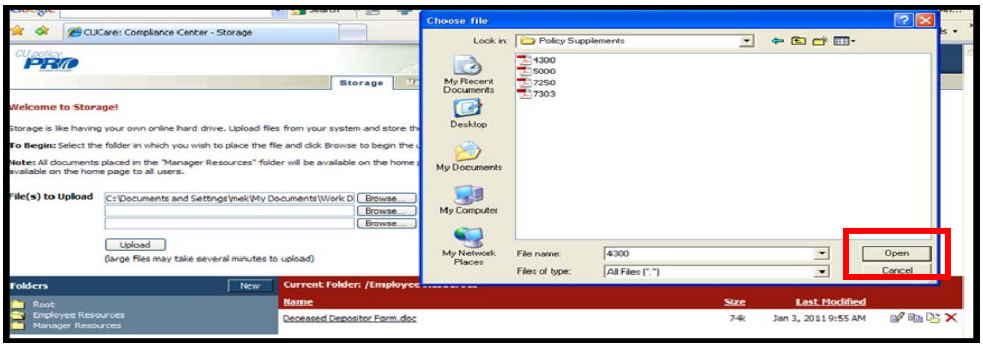
1. Click into the folder to which you want to upload your document.

2. To upload a document, click the “Browse” button next to the File Upload field. This will allow you to browse your computer hard drive or network to choose a file.

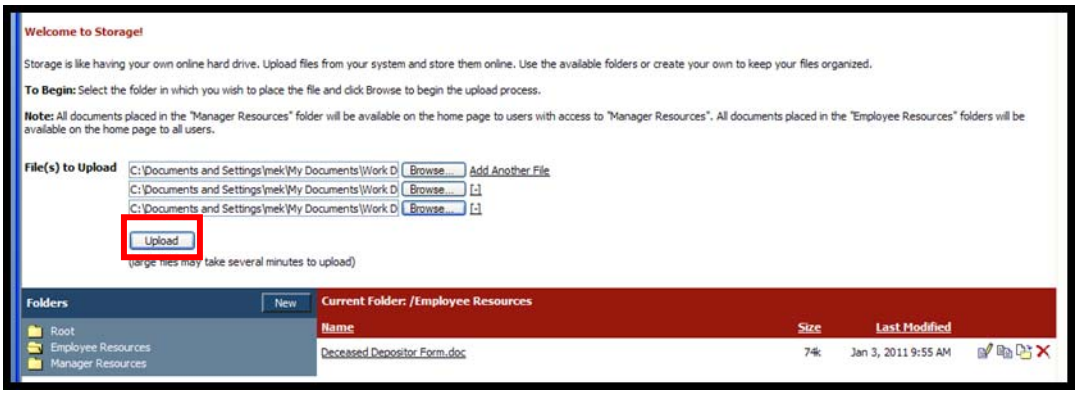
3. (Note: to upload multiple documents, click the “Add Another File” link. Click the “Add Another File” link to add as many upload fields as you need.)



4. Once you’ve found the file, to upload, click on the file name, then click the “Open” button on the dialogue box.



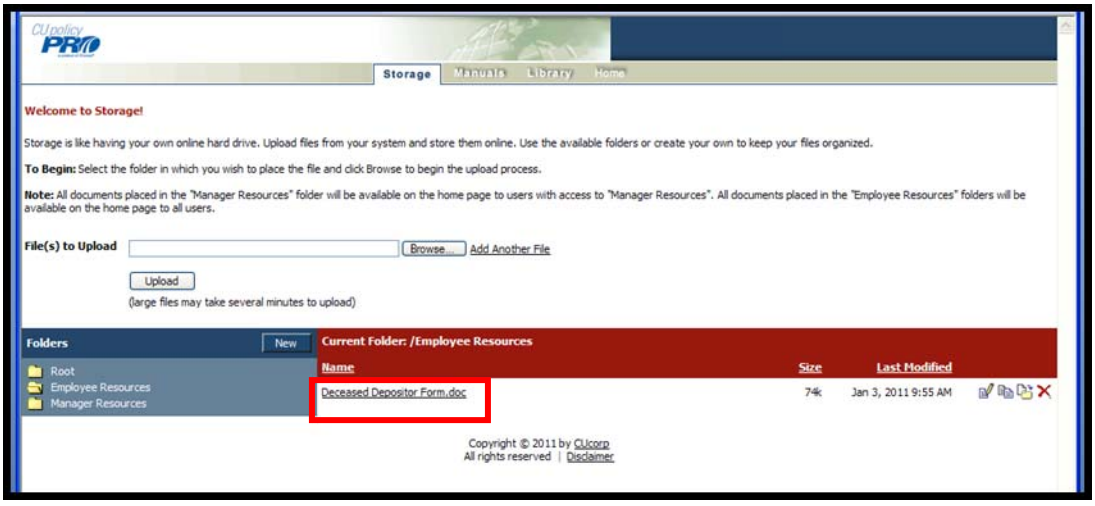
5. The name of the file will now appear in the file upload field. Click the “Upload” button, and the file will be uploaded.



Note: The Storage area supports the upload of multiple file types, such as Microsoft Office, Text, PDF, etc. However, when opening files, the computer you are working on must have that program available in order to access the file. This can sometimes be an issue when opening the file from a remote location.

Opening files in Storage

1. Once a file is in the *Storage* area, it can be opened by clicking on the file name. This will open the file in the whatever program the file was orginally created.



Making Changes to Files in Storage

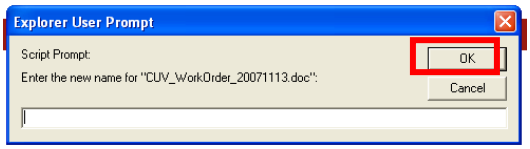
1. If any changes are made to the file after it is opened, the file must first be saved locally, then the updated document re-uploaded to *Storage*.

2. Files within the Storage area can be renamed, copied, moved to a different folder or deleted.

Renaming Files in Storage

1. To rename a file, click on the “rename” icon to the far right of the file name.

2. A dialogue box will open to allow you to rename the file. Enter the new name and click “OK”.



Copying files in Storage

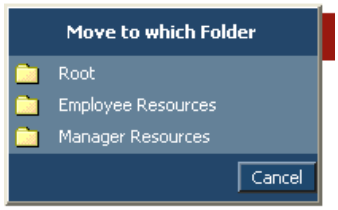
1. To create a copy of a document within the Storage area, click the “Copy” icon to the far right of the file name.

2. This will create a copy of the file, named “Copy of (file name)”. You can then rename or move this file, if desired.

Moving files between folders in Storage

1. To move a document to a different folder in the the Storage area, click the “Move” icon to the far right of the file name.

2. A dialogue box will open showing all available folders. Click the name of the folder where you want the document to move. This will move the document to that folder. Remember, any documents placed in the “Employee Resources” or the “Manager Resources” folders will be available on the Home Page.



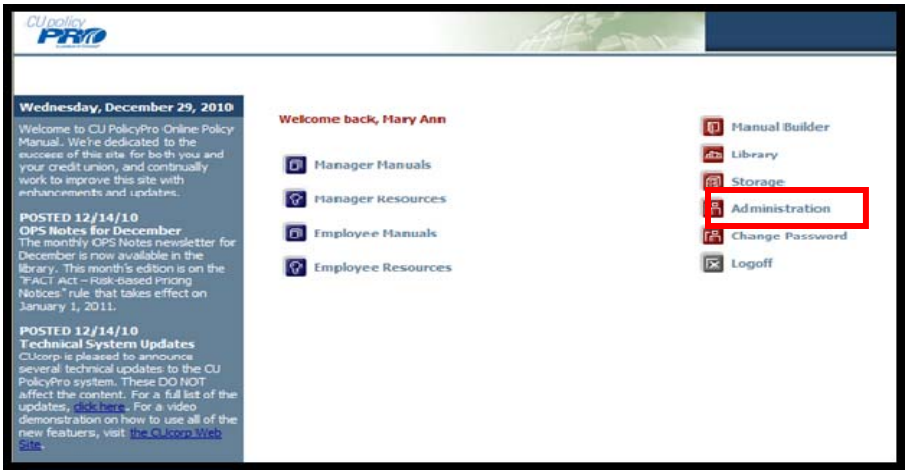
Deleting files in Storage

1. To delete a document from the Storage area, click the “Delete” icon to the far right of the file name.

2. This will permanently delete the document from the Storage area. If this document is deleted from the “Employee Resources” or the “Manager Resources” folders, it will no longer appear on the home page.

Administration

Click on “Administration” in the right hand navigation of the *Home Page* to access the *Administration* Area.

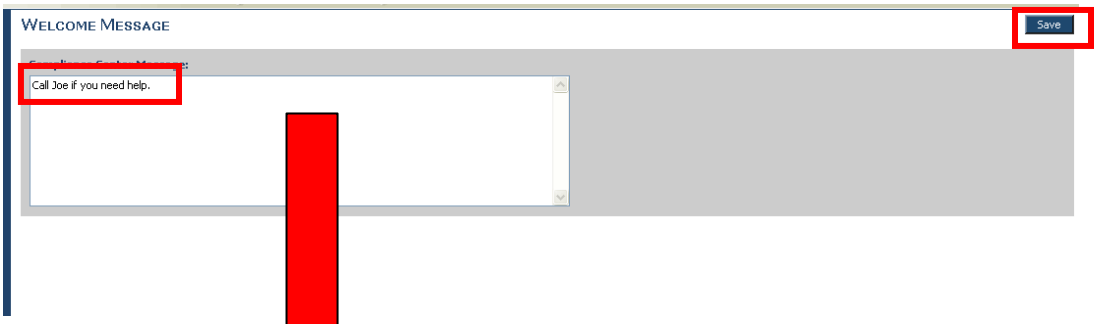


The *Administration* Area allows you to manage several functions, including the managing users, adding a Welcome Message to the *Home* Page, adding a disclosure to your published manual, uploading your logo, and viewing your license and subscription information.

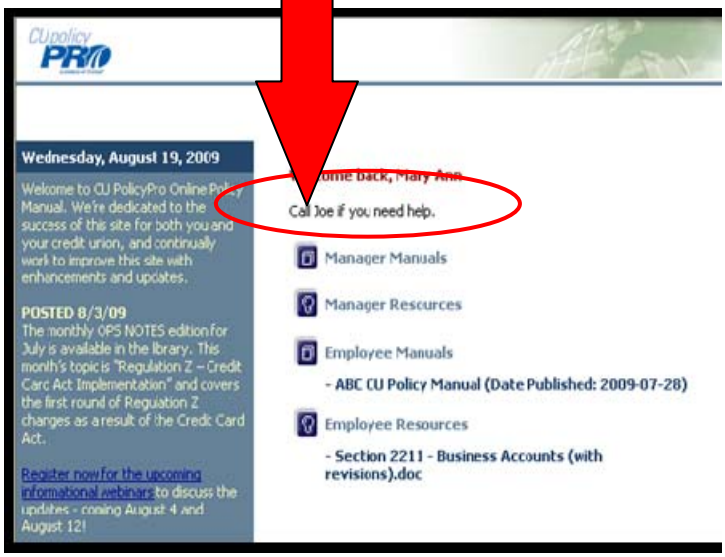
Administration: Adding a Welcome Message to the Home Page

1. Click on the “Welcome Message” button on the left navigation.

2. Type in the “Welcome Message” field any message you want to appear on the Home Page. Click “Save” when done.



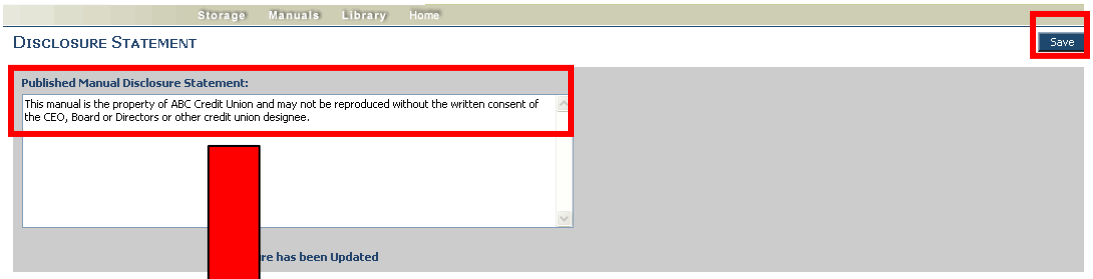
This message will now appear on the Home Page



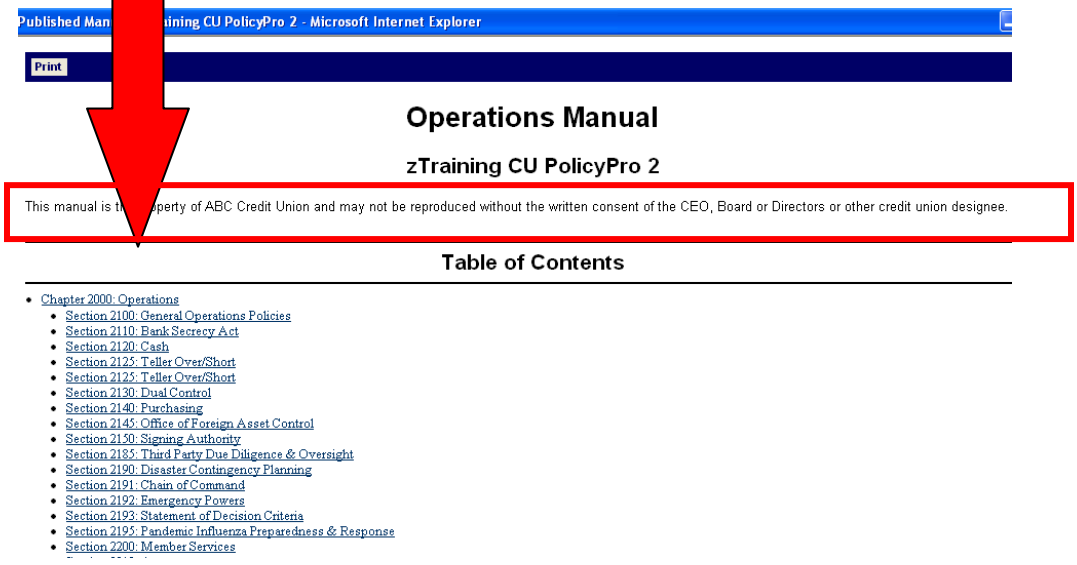
Administration: Adding a Disclosure to the Published Manual

1. Click on the “Disclosure Statement” button on the left navigation.

2. Type in the “Disclosure Statement” field the Disclosure you want to appear on the Published Manual. Click “Save” when done.



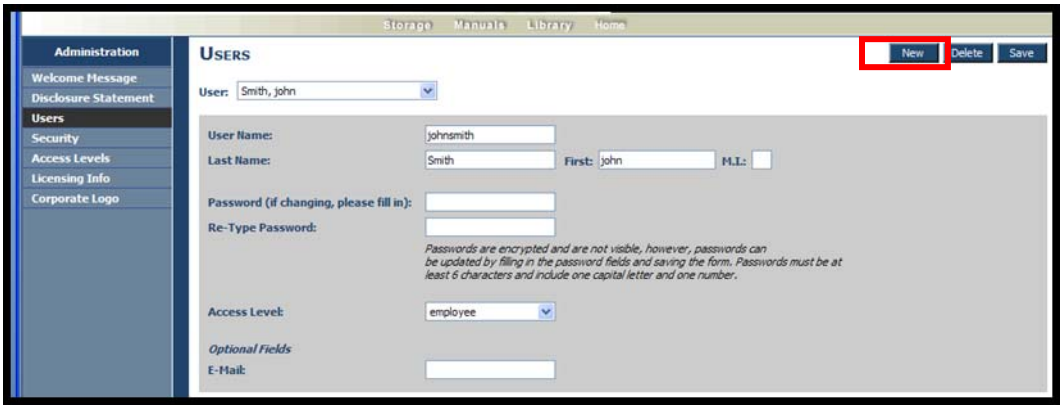
This message will now appear on the in the Published Manual, on the between the Title and the Table of Contents.



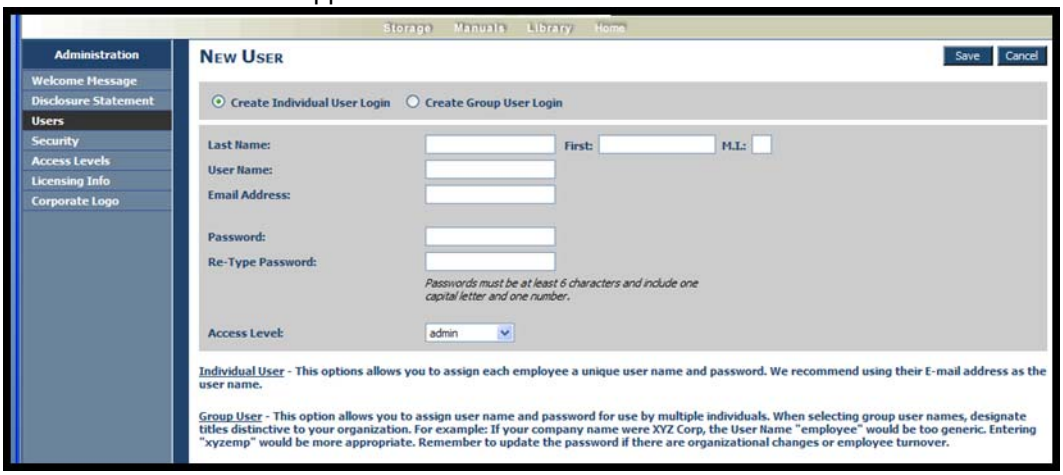
Administration: Adding New Users

1. Click on the “Users” button on the left navigation.

2. A list of current users will appear. Click the “New” button on the far right side of the screen.



3. The “New User” form will appear.



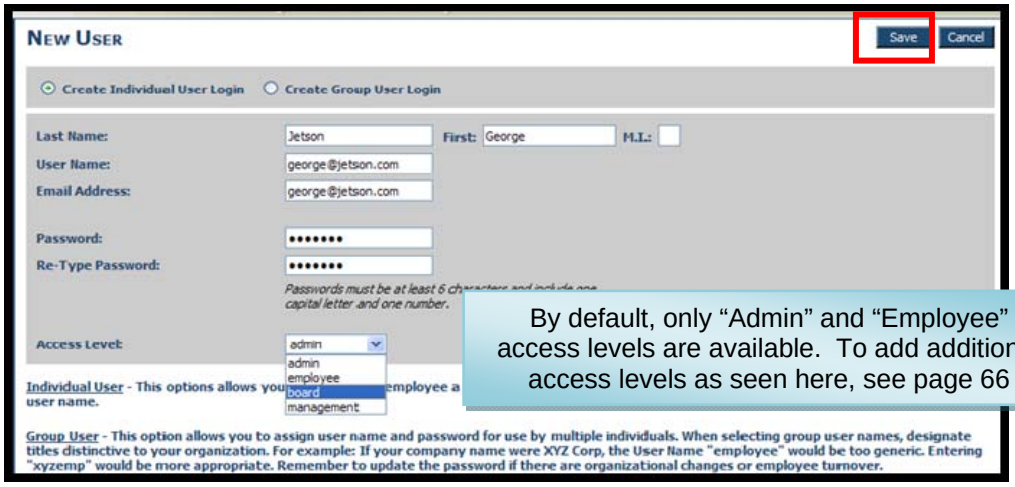
4. Two types of users can be created: Individual or Group Users.

5. Individual User is a distinct User Name and Password for a specific individual. A Group User is a User Name and Password that is shared among a group who all have the same access level (i.e. Board of Directors or Employees with read-only access)

6. For either an Individual or Group User, type in the First and Last Name (or Group Name for Group Users), the User ID, Email address, and Password. (Passwords are encrypted and must be entered in twice for security reasons).

7. From the dropdown list, choose the Access Level this user will have.

8. When you're finished, click the "Save" button.



By default, only "Admin" and "Employee" access levels are available. To add additional access levels as seen here, see page 66

Tip: An email address must be entered in order for the user to utilize the "Forgotten Password" function from the login screen. Group users will not have an email address option.

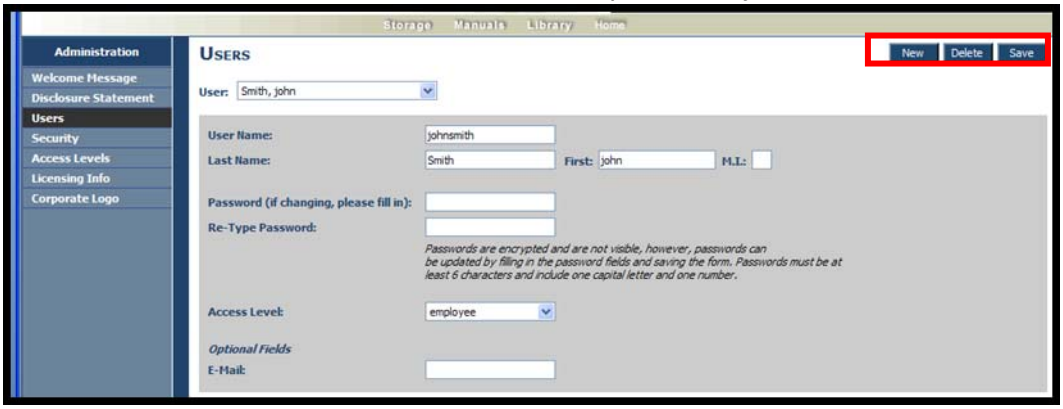
Administration: Editing or Deleting Users

1. Click on the "Users" button on the left navigation.

2. This will bring up the list of current users. Use the dropdown list to view individual user information.

3. For any user, you can update the user's first or last name, user name, password or access level. When any changes are made, click the "Save" button.

4. To delete a user, click the "Delete" button. This will permanently delete this user.



Administration: Creating Additional User Access Levels

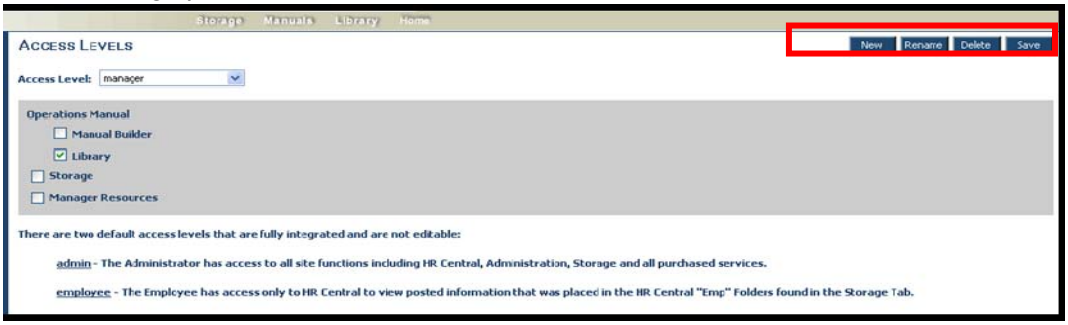
1. By default, there are only two access levels: *Admin* and *Employee*.

2. *Admin* level access gives the user full access to perform any function in the system. *Admin* is the only level of access that allows a user to access the *Administration* area.

3. *Employee* level access is read-only. A user with *Employee* access can login and will only see items posted in the "Employee Manuals" and "Employee Resources" folders on the *Home* Page. No navigation (other than Logoff and Change Password) will be available to an *Employee* level user.

4. You may find it useful to have access levels between Admin and Employee. To create and define these intermediate levels of access, click on the "Access Levels" button on the left navigation.

5. This will bring up *Access Levels* Form.



6. Click "New" to create a new access level. You will be asked to name the access level.

7. Then, use the checkboxes to determine what access these users will have.

   - **Manual Builder** allows this user to access the Manual Builder area, and the user will have full rights to edit the Working Manual, including publishing, archiving, etc.
   - **Library** allows the user to access the resource found in the Library
   - **Storage** allows the user to full access to the Storage area, including uploading files and posting them to the "Employee" and "Managers Resources" folders.
   - **Manager Resources** will allow this user to see the documents posted in the "Manager Resources" folder, as well as manuals posted to the "Manager Manuals" folder.

   Note: if all four options are checked, this user can do anything except go into the ADMINISTRATION area.

8. Choose one or more access rights for the user level, and click Save.

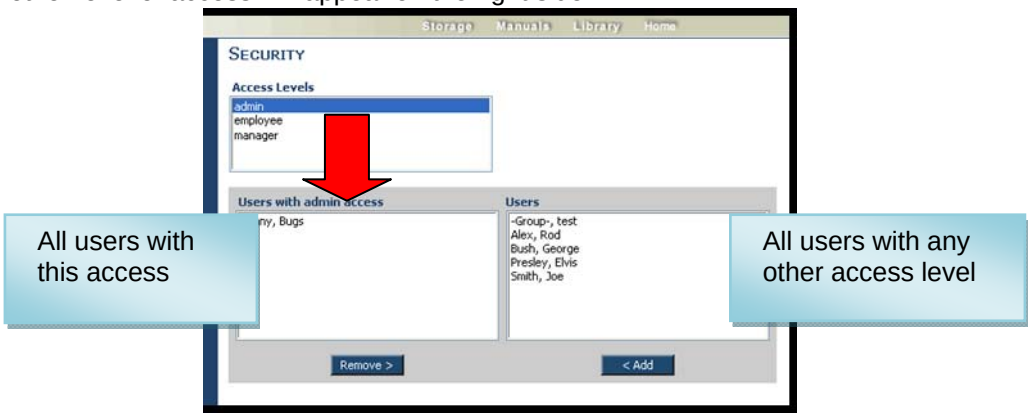
9. You can also delete or rename existing access levels, using the buttons on the far right of the screen.

Administration: Viewing/Editing Multiple Users at Once

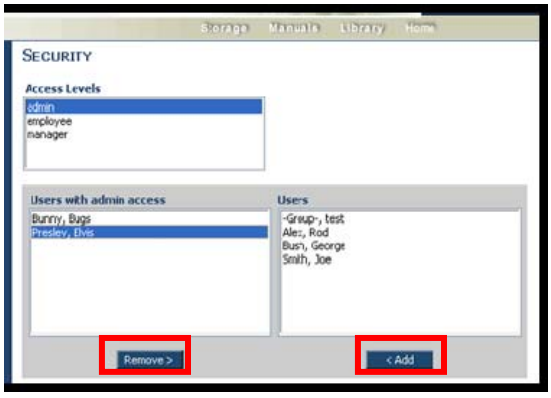
1. Use the “Security” tab to view all quickly user levels and user IDs, and to quickly change the user access level for multiple users at one time.

2. Click on the “Security” button on the left navigation.

3. Clicking on the various access levels will show in on the left side all users with that level of access. All users with any other level of access will appear on the right side.



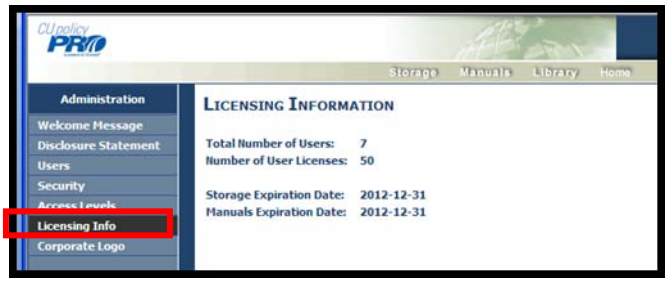
4. Click on a user and use the “add” or “remove” buttons to move users in or out of any access level. This can also be done by individual user in the *Users* tab.



Tip: You will not see your own User Name. This prevents you from inadvertently removing yourself as an admin.

Administration: Viewing License and Subscription Information

1. To view your licence and subscription information, click on the “Licensing Info ” button on the left navigation.
2. This will display the number of users you currently have set up, and the total number available. By default, each credit union receives 50 user licenses.
3. This will also display your subscription expiration date.



Administraion: Corporate Logo

1. A logo can be uploaded in the Administration area to be used on the title page of any published manual.
2. Click on the “Corporate Logo” button n the left navigation.
3. Use the “Browse” button to upload your logo. Your current logo will show below the “browse” field.
4. To replace a current logo, simply use the “Browse” button to upload the updated logo, which will replace any logo currently in the system.

Appendix A – Printing Tips

Printing Tip #1: Header and Footer

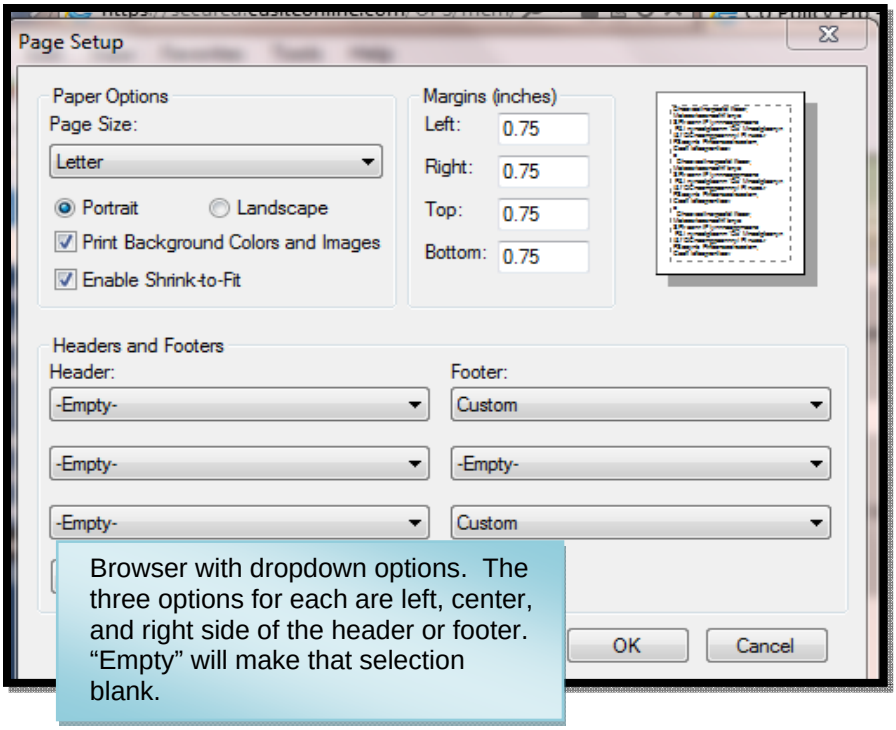
Because this is an HTML document printing from a Web site, your Internet Page Set Up options will apply when you print the manual. Many Internet Page Set Up options call for the URL to print on the header and/or the footer of the page, which can make the page look cluttered and unprofessional.

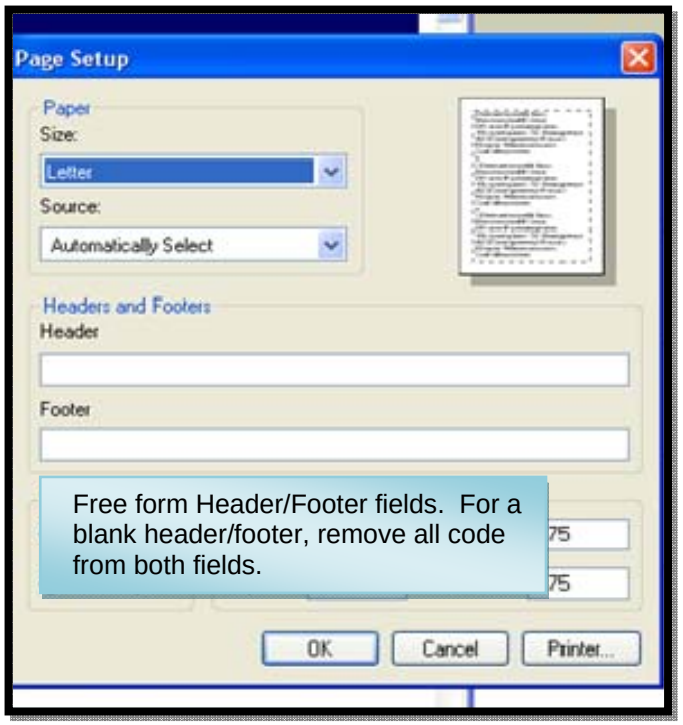
To suppress the URL, go to the "File" menu on your Internet Browser navigation bar, and choose "Page Set Up"

A pop up box will open with the Page Set Up options. The Page Set up options pop up may look different depending on your Internet Browser version. Two examples are below.

The Header and Footer options allow you to choose what shows in on the Header or Footer of your printed documents. Many credit unions choose to remove all header and footer codes.

Depending on your browser, this may be a dropdown box selection, or you may have to delete code from the Header and Footer fields.





If your browser provide dropdown selections, you can choose to add in page numbers, date, or other options. If your browser only provides a Header/Footer fields, Appendix B includes the code text that can be entered to customize your header and footer.

Note: These settings will apply to all documents printed off the internet from your computer. You may want to copy the current header and footer settings to a Word document so you can add them back in later. You may not want the URL to print on your manual, but you might want it for printing from other web sites.

Also, these settings apply to a particular computer. A user printing the policies from another computer may also have to adjust their settings.

Tip #2: True Print Preview

The "Preview" mode of either a single policy or the published manual opens an HTML document, and will show all text, date field information and Key Field code replacement for the policy. However, page breaks, paragraph breaks, tables and columns, and headers and footers will not be shown in true print preview format.

To veiw an accurate representation of what the policy/published manual will look like when printed, follow these steps:

1. **Open the policy or published manual in "Preview" mode**
2. **From the File Navigation menu, choose "File", then "Print Preview"**

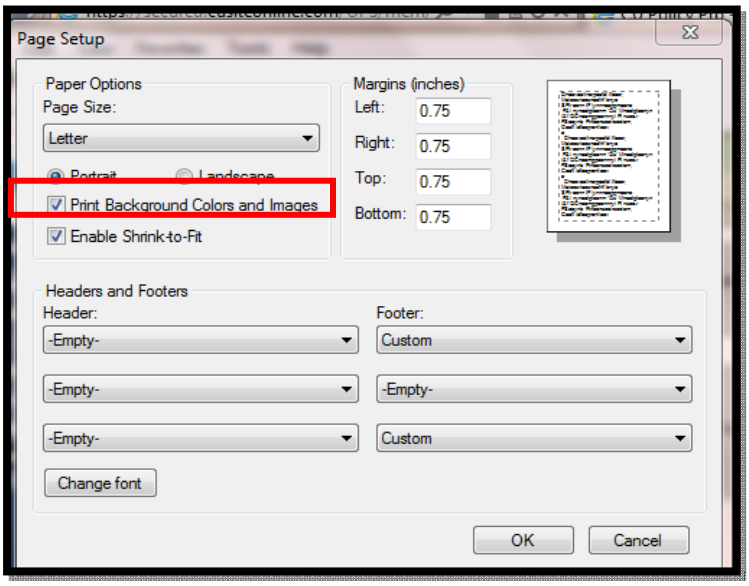
For larger published manuals, the print preview may take a minute or two to load.

Tip #3: Printing Background Highlighting
If background highlighting has been applied to policy text, but is not printing, there is a browser setting that must be changed.

Depending on your browser, this setting may be found in different places. Below are two browser examples of where to find the setting and how to change it.

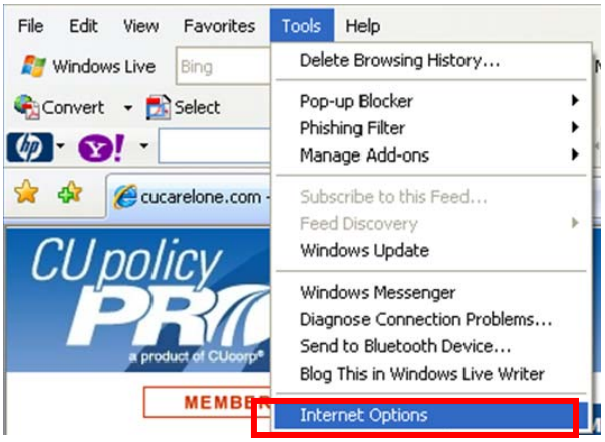
Try this first:

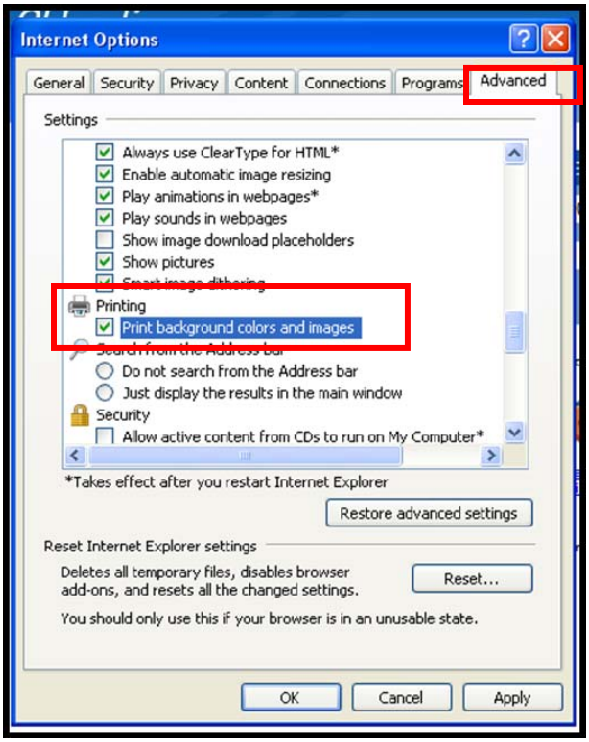
1. **Go to FILE > PAGE SET UP.**
2. **The setting It is the "Print Background Colors and Images" setting.**
3. **This must be checked, otherwise background highlighting will not print.**



If the "Print Background Colors and Images" setting is not under FILE > PAGE SETUP, try this:

1. **In Internet Explorer, go to TOOLS > INTERNET OPTIONS**
2. **Go to the ADVANCED tab**
3. **Find the PRINTING options**
4. **Make sure "Print background colors and images" option is checked**





Appendix B – Header and Footer Codes for Printing

Code	Description of what will print	Example of what will print
&w	Window title.	Published Manual: ABC CU
&u	Page address (URL).	https://securesite.cusiteonline.com/PS/?theid=951
&d	Date in short format specified by Regional Settings.	8/26/2009
&D	Date in long format specified by Regional Settings.	Wednesday, August 26, 2009
&p	Current page number.	1
&P	Total number of pages.	87
&&	A single ampersand: &.	&
&b	Separates preceding and following text into different sections (one instance will center, two will right justify)	See examples below - this would be used in combination with other text
	Nothing - removes IE header and / or footer completely.	
Add your own text	Will print the text you typed in	ABC CU Policy Manual

Code Combination Ideas	Description of what will print	Example of what will print
Page &p of &P	Current page number and total pages in document	Page 1 of 22
Page &p	Current Page number	Page 1
Your Own Text &b &b Page &p of &P	Your text left justified, page numbers right justified	ABC CU Manual Page 1 of 22
&b Page &p of P	Current page number and total pages in document (centered)	Page 1 of 22