Key Fields Content

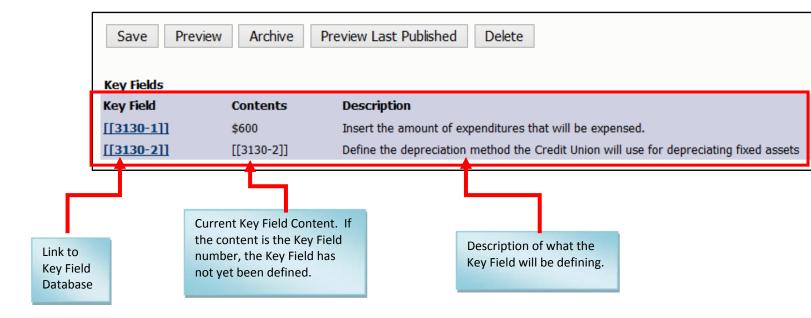
CU PolicyPro model policy content includes a series of *Key Fields* to assist with customization of the model policies. Key Fields are bits of information which are important to completing the policy, but will vary from organization to organization. An example of a Key Field would be the dollar threshold for expensing an asset versus depreciating an asset.

Not every policy has Key Fields, and some policies have many Key Fields. A full list of the Key Fields, which includes the Key Field number and a brief description of the Key Field, can be found in the *Key Fields Guide* document.

Within the content, a Key Field is a small piece of code. The Key Field code is typically a number enclosed in double brackets (e.g., [[3030–1]]). The first number of the Key Field correlates to the policy number, making Key Fields easy to find throughout the Manual.

For any policy that contains a Key Field, the Key Fields are listed directly below the content area. There is a link to the Key Field database editing window, a listing of the content entered for the Key Field, and a description of the Key Field.

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

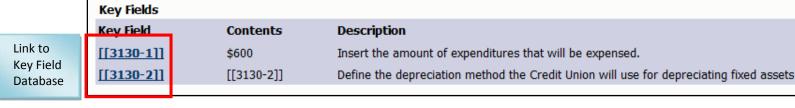


Defining Key Fields

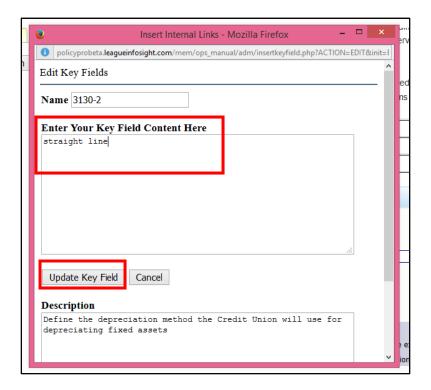
Key Fields can be defined one of two ways: At the individual policy level, which allows you to define the Key Fields for a single policy, or using the Manage Key Fields, which allows you to define Key Fields for multiple polices at once.

Define Key Fields at the Individual Policy Level

- 1. Click on the "CU Policies" tab at the top left of the screen to make sure you are in the CU Policies manual.
- 2. Using the plus signs to the left of each folder, expand the "MANUAL ADMINISTRATION" and the "EDIT CU POLICIES" 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.

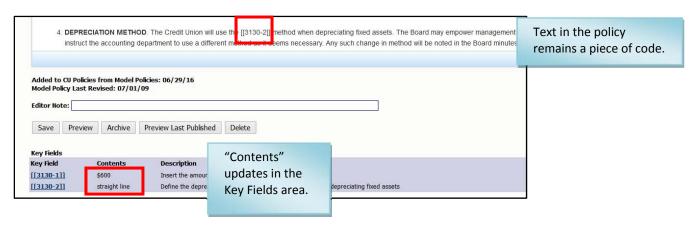


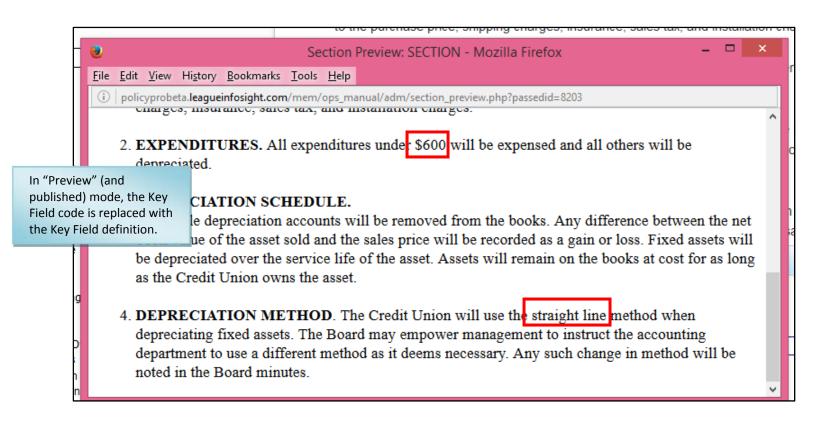
- 5. A pop up box will open. Define the Key Field in the box labeled "Enter Your Key Field Content Here". Remove the Key Field number as it is only an indicator that the Key Field has not yet been defined. If the Key Field number is not removed, it will print as part of the policy.
- 6. Click the "Update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



Define Key Fields at the Individual Policy Level (Continued)

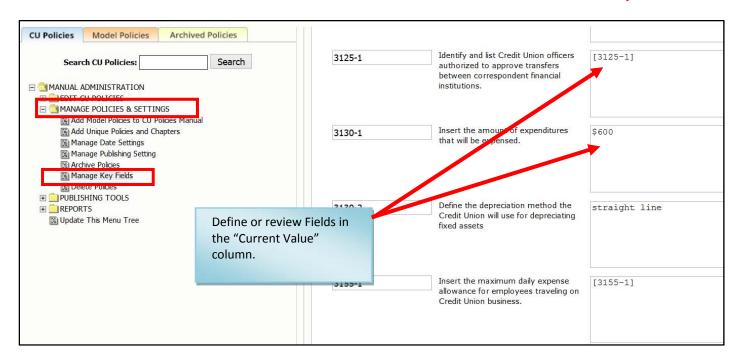
- 7. Once you have updated the Content of the Key Fields, the content will not show up until the page is refreshed. The easiest way to do this is to save the policy. **Until the page is refreshed, you will not see your content in the Key Fields area.**
- 8. After the page is refreshed and the custom content appears in the Key Fields area, the actual text within the policy will still show the bracketed Key Field number. This is because within the content of the policy, the bracketed Key Field number is a piece of code that will be replaced with the Key Field "Contents" once it is printed.
- 9. Use the "Preview Working" button to see the Key Field replacement. Publishing the manual will also insert the correct text into the Key Field code area.





Define Key Fields directly in the Key Fields Database

- 1. Click on the "CU Policies" tab at the top left of the screen to make sure you are in the CU Policies manual.
- 2. Using the plus signs to the left of each folder, expand the "MANUAL ADMINISTRATION" and the "MANAGE POLICIES & SETTINGS" folders.
- 3. Click the "Manage Key Fields" link under the "MANAGE POLICIES & SETTINGS" folder.
- 4. On the right side of the screen, a full list of all Key Fields in the Key Fields database will show. **Note:** There are many Key Fields, so the Key Fields list is very lengthy. You will need to scroll to see all of the Key Fields.
- 5. Scroll to find the Key Field you want to define, and define the Key Field in the "Current Value" column (the third column to the right). Remove the Key Field number as it is only an indicator that the Key Field has not yet been defined. If the Key Field number is not removed, it will print as part of the policy.



6. To save your Key Field definitions, scroll to the very end of the Key Fields listing and click the "Save" button. **This is very important!** If you leave the Manage Key Fields area without clicking the "Save" button, your changes will not be saved.

