CU PolicyPro
USER'S GUIDE

CU PolicyPro User's 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 its 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 operations.

We have developed a series of Key Fields to assist you in inserting your organization's specific information into various policies. Editing, deleting, or adding to the text of the policies is a broader and more flexible area of customization. You can modify the policies to meet your needs, including customizing the model policy content and adding your own unique policies to your manual.

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.

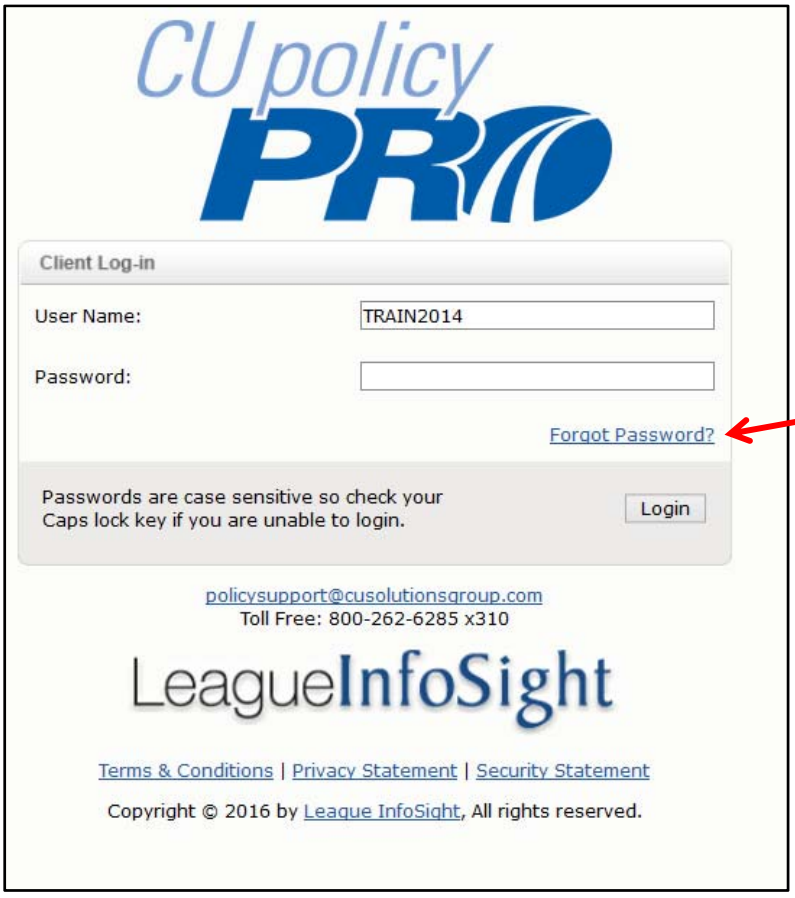
Note: The look of the toolbar buttons may vary slightly on your screen from the screen shots shown in the document. This can be due differences in the internet browser, operating system and screen resolution used.

Technical support is provided by the staff at CU Solutions Group. If you have questions or need assistance, please email policysupport@cusolutionsgroup.com or call 800-262-6285 x310 or x527.

Getting Started: Logging In

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

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



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

Getting Started: The Home Page

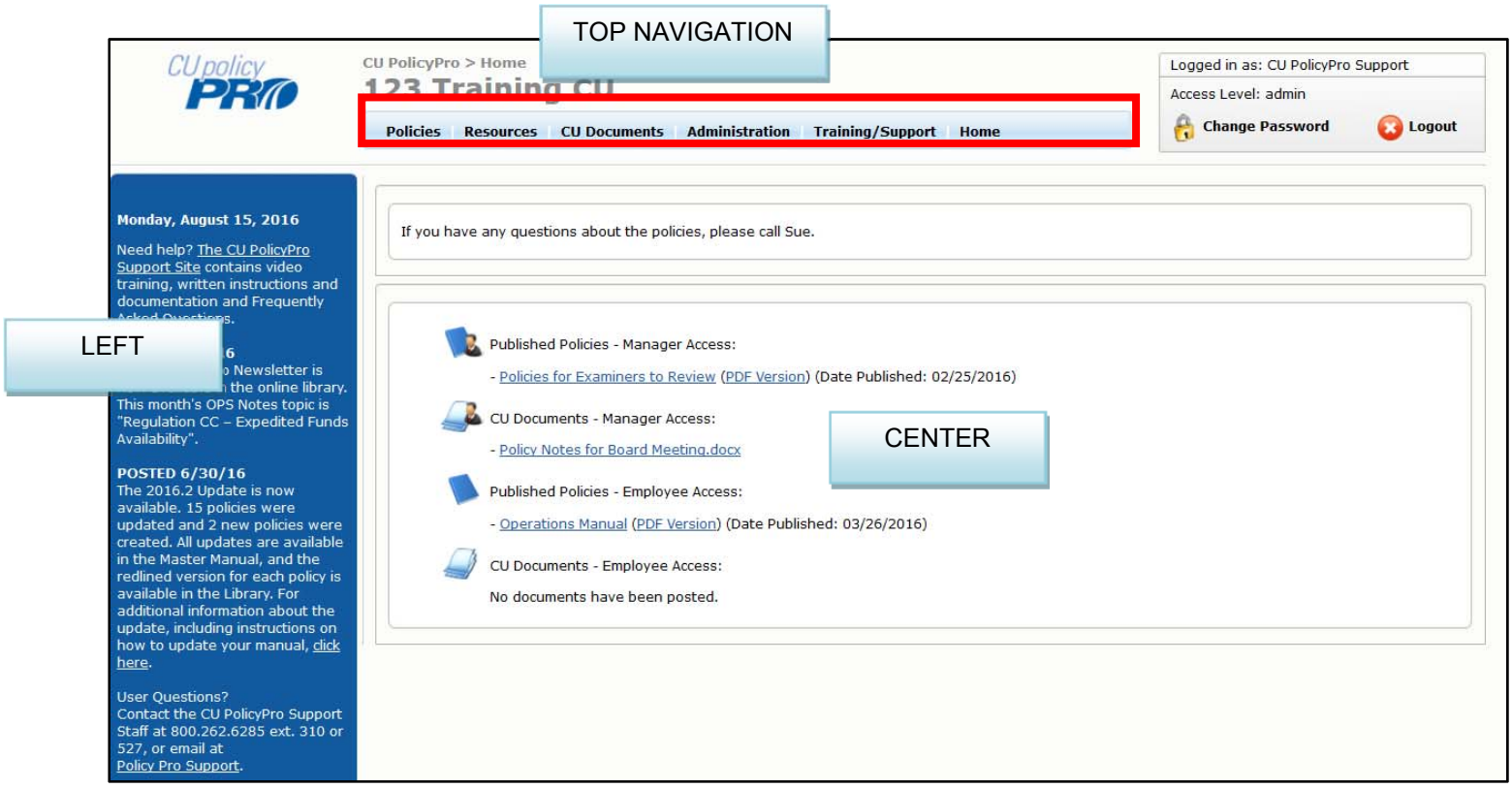
The Home Page of CU PolicyPro provides the user with information, navigation resources, and other resources as provided by the organization's administrator.

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. Information on training resources and 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 policies (manuals) or resources that have been posted by an administrator. Access to policies and 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 **top navigation** has the navigation menu to access the various areas of the site. This menu will remain at the top of the screen throughout all areas of CU PolicyPro. **Note:** The screen shot below shows the top navigation bar for a user with full "admin" access. Users with any access level other than "admin" will see fewer options in the navigation bar. What is available depends on the level of access assigned.

The "Home" option on the navigation menu will bring you to this home page from any area of the site. In the right corner is an icon to logout of the system.

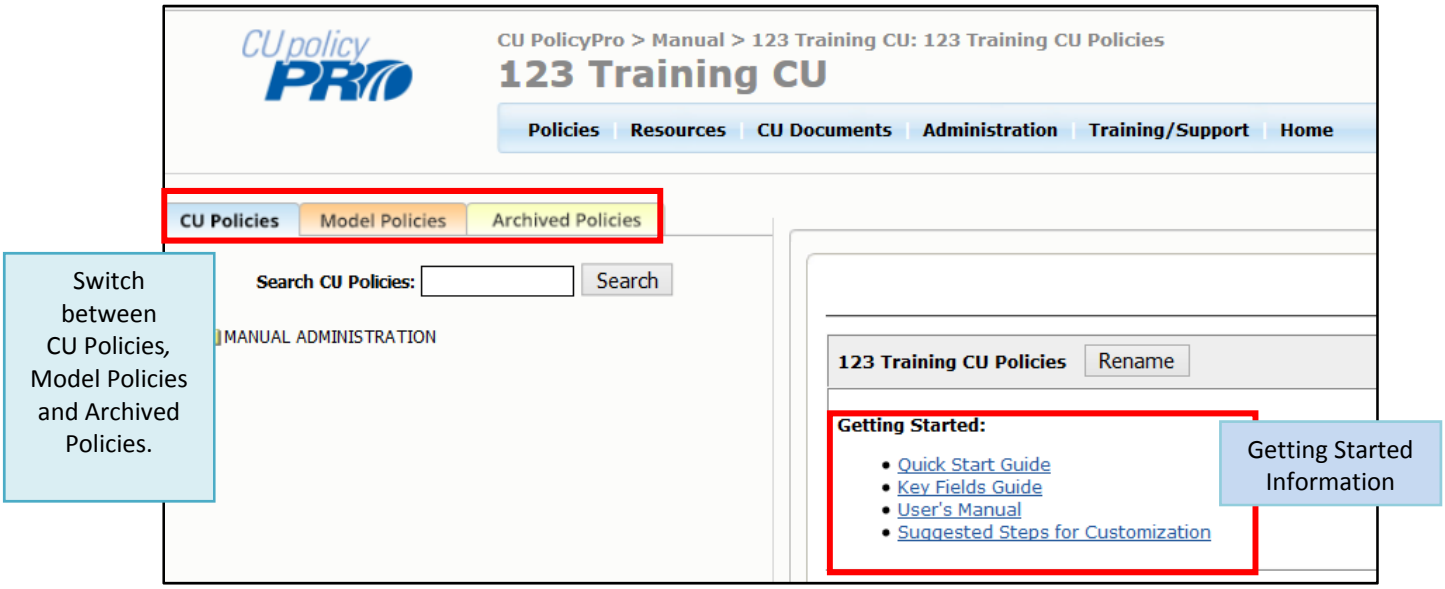


Working with Policies: Accessing Policies

All policies are housed in the Policies area of CU PolicyPro. Policies can be opened by clicking on the "Policies" tab on the top navigation menu when you first login.

In the Policies area, near the top left of the screen, there are tabs to access your CU Policies, the Model Policies and Archived Policies. When you open the Policies area, by default you will be in CU Policies. To move between the CU Policies, Model Policies or Archived Policies, click the corresponding tab.

When you first enter the Policies area, some resources for Getting Started are available on the right side of the screen. As you move through the navigation found in the CU Policies, Model Policies and Archived Policies, the information on the right side will change.



Important Definitions & Information

- The ***CU Policies*** manual is used to maintain and customize the policies for your organization. The CU Policies manual contains the top level chapter folders, but does not contain any policies unless they have been added. Model policies can be added to the CU Policies manual from the Model Policies manual, or unique policies may be added.

    - Note: The policies within the CU Policies manual can (and should) be customized for your organization. The actual content in the CU Policies may contain model policy content if you have not yet customized the content.

- The ***Model Policies*** manual contains all available model policies. Any model policy can be moved from the Model Policies manual to the CU Policies manual.

- The **Archived Policies** manual houses any policies that have been archived from the CU Policies manual. Policies are **not** archived automatically.

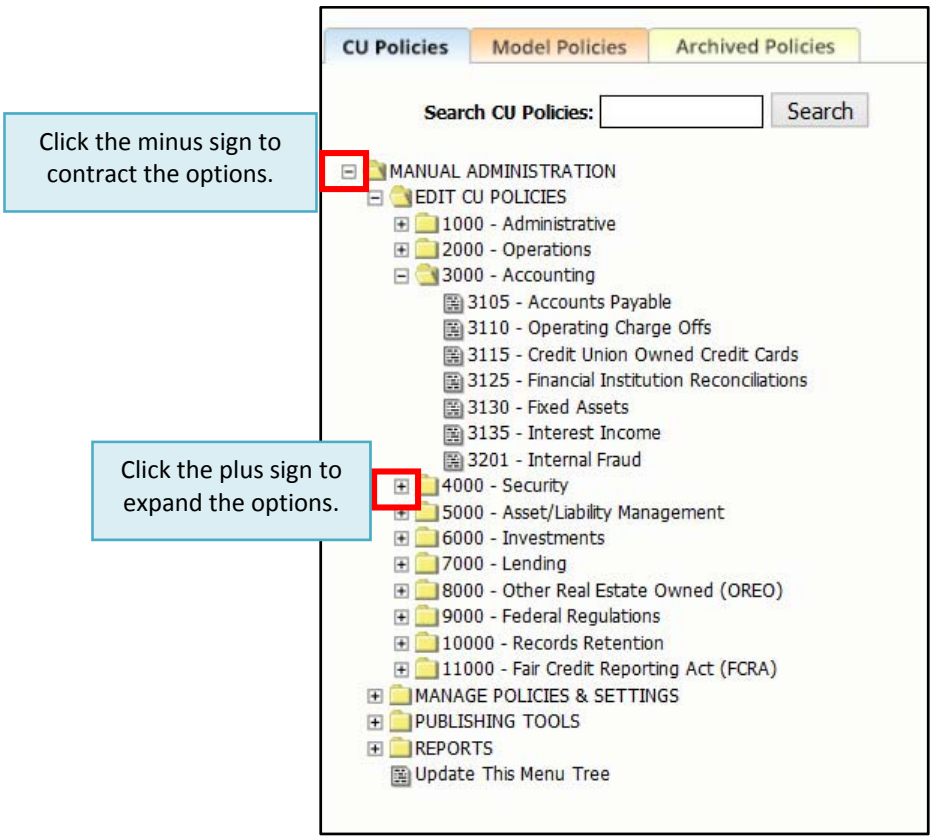
Instructions continue on the next page.

Working with Policies: Navigating Policies

Whether you are in the CU Policies, Model Policies or Archived Policies, 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 the folder is expanded. Clicking the minus sign will contract the folder.



Working with Policies: Viewing & Printing Model Policies

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

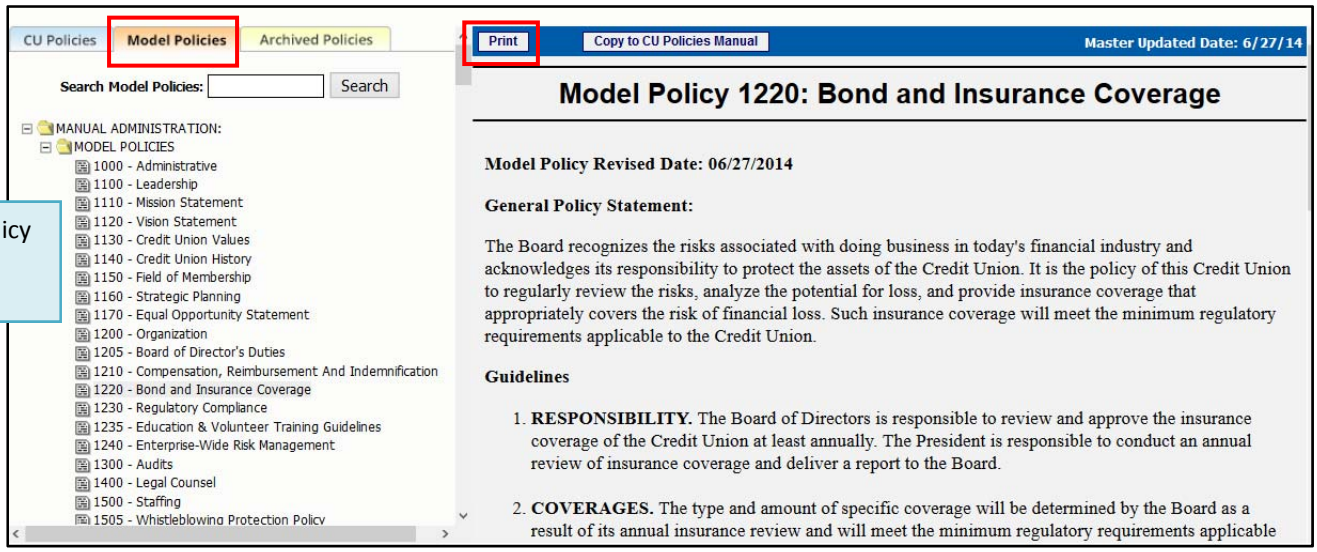
2. Click the plus sign next to the “MANUAL ADMINISTRATION” folder and the “MODEL POLICIES” folders to expand both folders.

3. You will see a listing of all the available model polices. Model Policies are indicated by a grey background and cannot be edited. The content must be moved to the CU Policies manual in order to be edited.

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.

   Note: While it is recommended to take full advantage of the policy management system in CU PolicyPro, for those credit unions who wish to maintain their policies in Word, the model policy content can be copied/pasted to Word from the Model Policies manual.



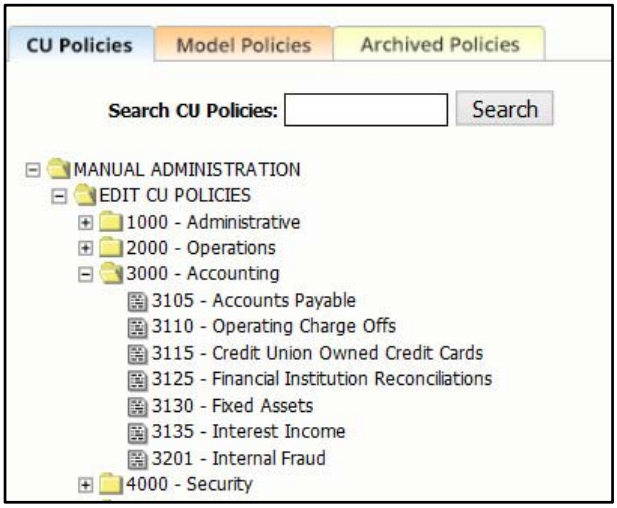
Model Policy Listing

Working with Policies: Viewing & Printing CU Policies

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. The top level chapter topics will display. Each chapter page is divisible by 1000. Chapter pages include a piece of code that will generate table of contents for what is included in the chapter, but do not include policy content.

3. Click the plus sign next to the chapter you wish to open. A listing of policies within that chapter will appear.

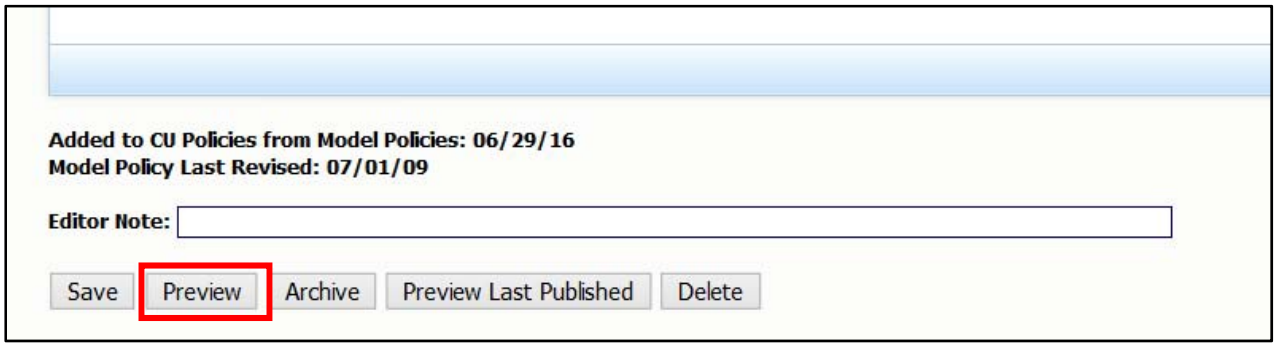


4. Click on the name of the policy you would like to view, and the full text of the policy will appear on the right side of the screen (editing screen). You can read through the policy on the editing screen.

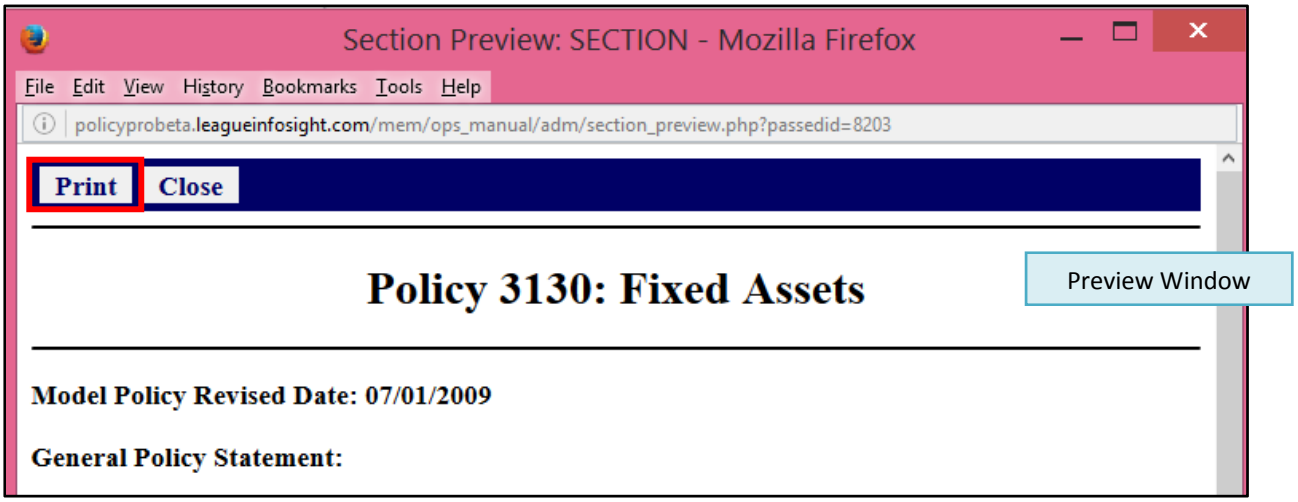
5. If you have **full editing rights** within the CU Policies manual, see 5A below. If you have **read only rights** within the CU Policies manual, see 5B below.

   A. Users with **full editing rights** will see the policy opened in a content editor. The background of the policy will be white. Click the "Preview" Button directly below the content editor (you may need to scroll to get to the buttons). A new window (preview window) will open. Many people find it easier to read the full policy in the preview window rather than in the editing screen.

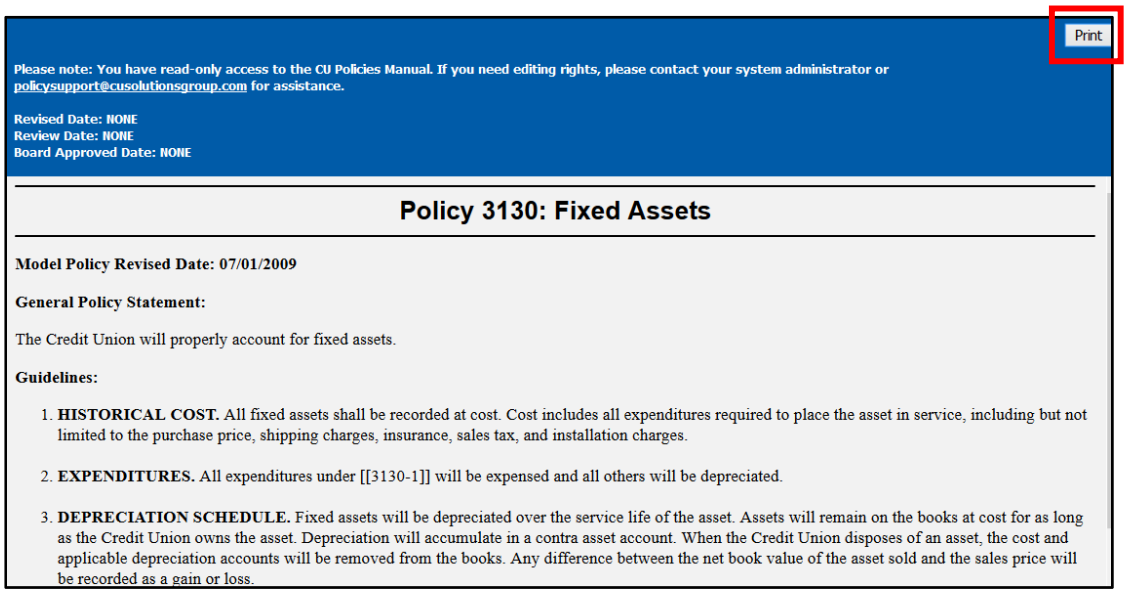
   Note: If your policy has not yet been published, you will not see the "Preview Last Published" button as shown in the screen shot below.



At the top of the preview window is a “Print” button that can be clicked to print this single policy.



B. Read Only Rights. Users with Read Only rights will see a blue information bar above the policy content. The policy will show with a grey background. Click on the “Print” button in the top right of the blue information bar to print the policy.



Working with Policies: Adding Policies to the CU Policies Manual

Model policies from the Model Policies manual, or your own unique policies, can be added to your CU Policies manual. **Note: Users with Read Only Access in the Policies area will not be able to do add policies to the CU Policies area**.

Note: If you already have an instance of a policy in your CU Policies manual and you chose to move a second instance of that policy into your CU Policies manual, you will be prompted to confirm how to want to handle the duplicate policy.

Adding Model Policies to the CU Policies Manual

Adding model policies from the Model Policies manual to the CU Policies manual can be done one of two ways.

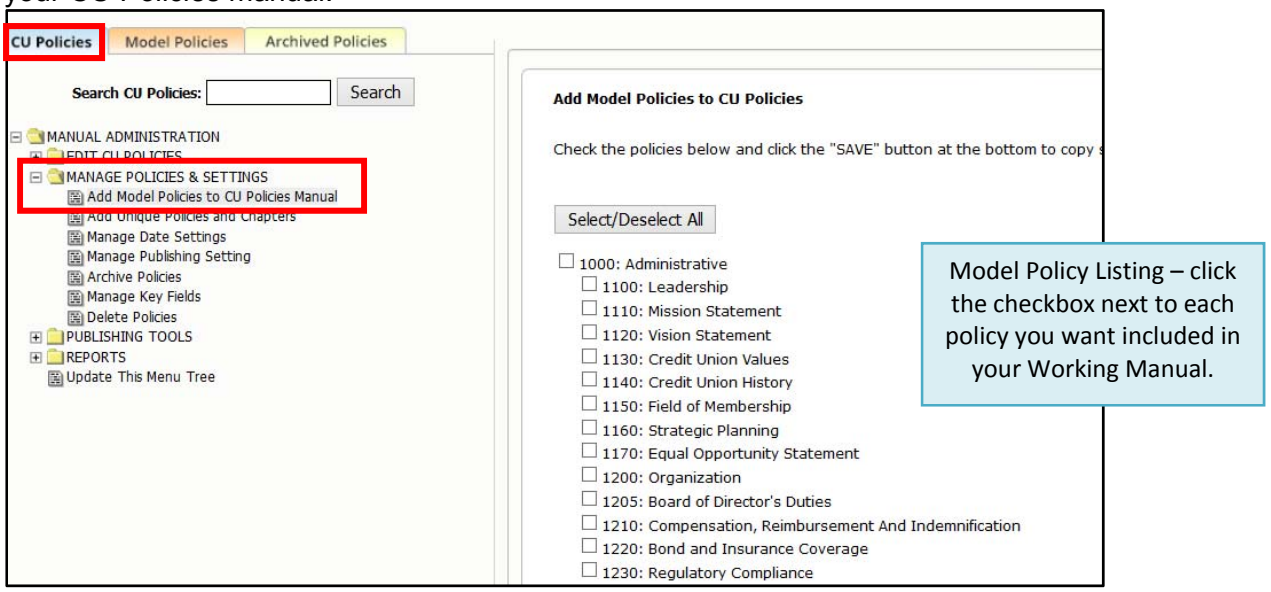
Option 1: Add multiple policies at one time. This option works best if you know exactly what policies you'd like to bring into your CU Policies manual, and do not need to review the content prior to bringing the content into your CU Policies manual.

1. Click on the "CU Policies" tab at the top left of the screen to make sure you are in the CU Policies.

2. Using the plus signs to the left of each folder, expand the "MANUAL ADMINISTRATION" and the "MANAGE POLICIES & SETTINGS" folders.

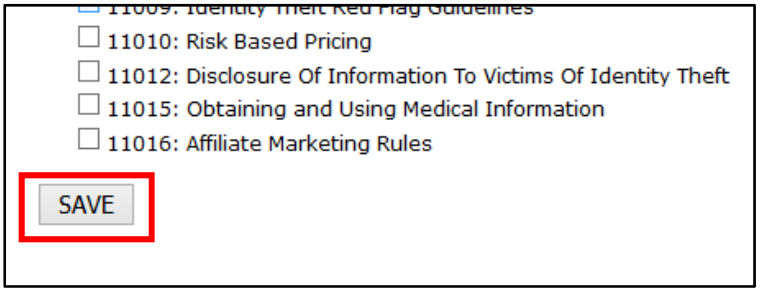
3. Under the "MANAGE POLICIES & SETTINGS" folder, click the "Add Model Policies to CU Policies Manual" link. On the right side of the screen, a form will appear listing all model policies available from the Model Policies manual, with a checkbox next to each policy.

4. Click the checkbox next to each model policy that you want to move from the Model Policies manual to your CU Policies manual.



Adding Model Policies to the CU Policies Manual (continued)

5. Scroll to the end of the page and click the “Save” button. The current model policy for each selected policy will be added to your CU Policies manual.



Note: If one or more of the policies selected is already part of the CU Policies manual, you will be prompted to choose for each policy if you wish to 1) overwrite the current policy or policies if there is more than one instance of a particular policy, 2) create an additional copy of the policy, 3) cancel if you do not want to add the policy.

Option 2: Add one policy at a time. This option works best if you want to review the content of a model policy before adding the policy to the CU Policies manual.

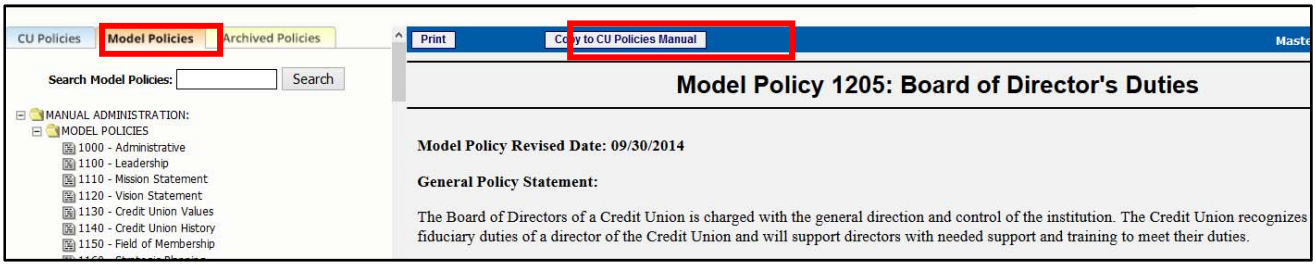
1. Click on the “Model Policies” tab at the top left of the screen to make sure you are in the Model Policies manual.

2. Using the plus signs to the left of each folder, expand the “MANUAL ADMINISTRATION” and the “MODEL POLICIES” 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 CU Policies Manual” button.



Adding Unique Policies to the CU Policies Manual

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.

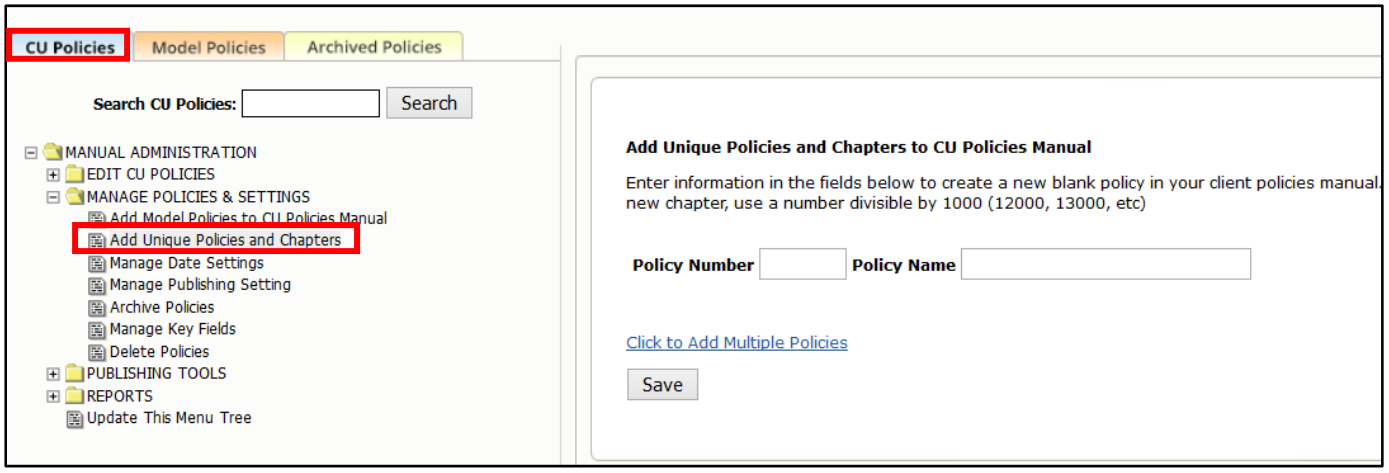
3. Click the “Add Unique Policies and Chapters” link.

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 “Policy Number” field and the policy name in the “Policy Name” field.

   Tip: The policy number chosen must be greater than 1000 and fall into an existing chapter folder. Policy numbers below 1000 or those that have no associated Chapter folder will not be accessible for editing in the CU Policies.

5. To add more than one policy at one time, click the “Click to Add Multiple Policies” link.

6. Click the “Save” button. This creates a blank policy in your CU Policies manual. The new policy will appear in the CU Policies manual in numeric order.



Note: If one or more of the policies selected is already part of the CU Policies manual, you will be prompted to choose for each policy if you wish 1) overwrite the current policy or policies if there is more than one instance of a particular policy, 2) create an additional copy of the policy, 3) cancel if you do not want to add the policy.

7. To add a new chapter, type the Chapter number in the “Policy Number” field and Chapter name in the “Policy Name” field. Chapters must be divisible by 1000 (i.e. 9000, 10000, etc.). Policies will not be available for editing in the CU Policies 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.

Editing Policies: General Information

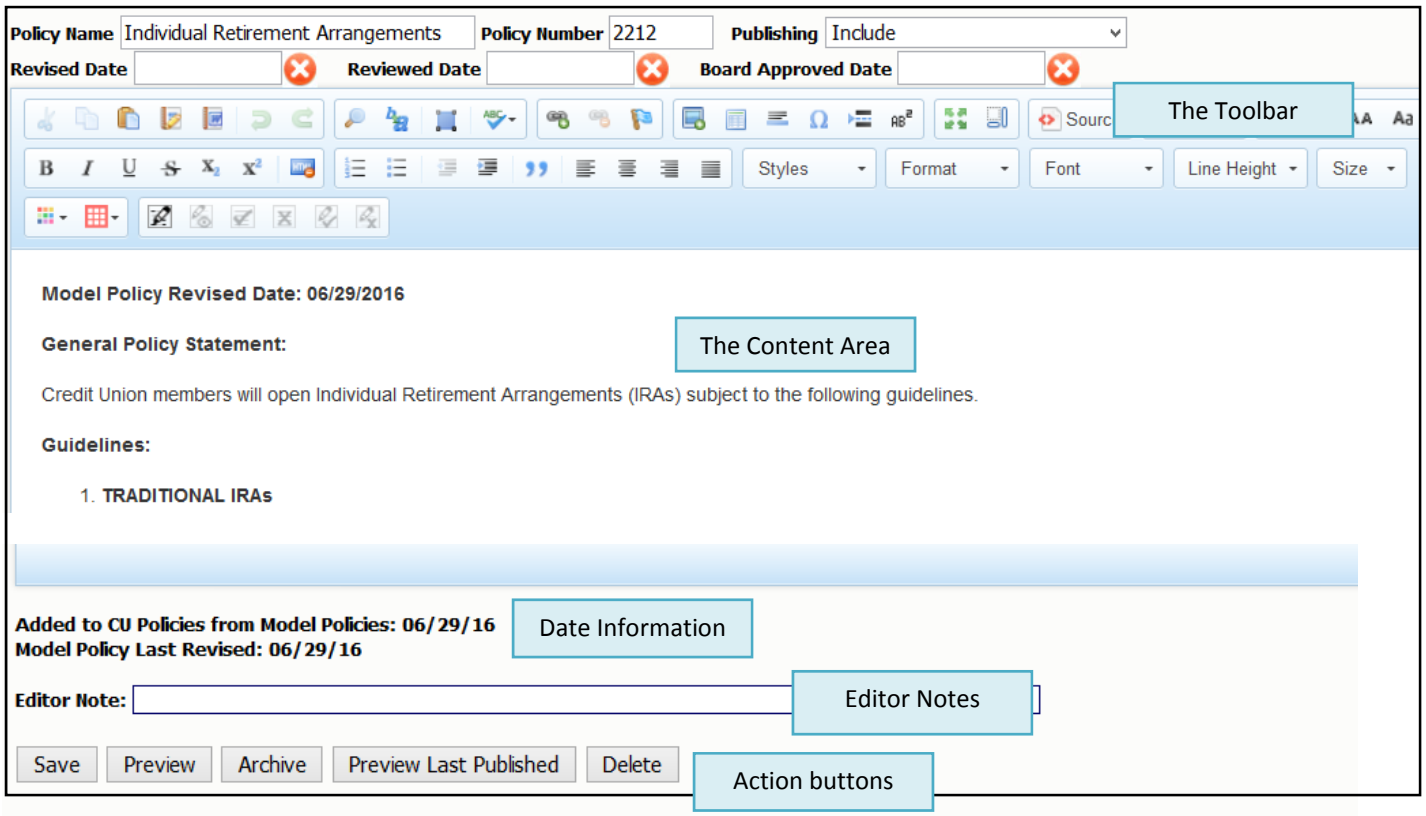
When you open a specific policy, the full text of the policy is available on the right side of the screen. It opens within a content editor, allowing full customization of the text.

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.

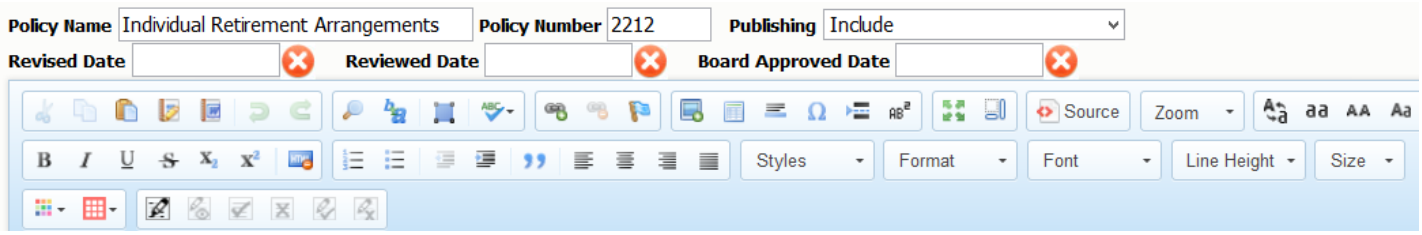
Below the content area are editor notes, date information specific to the policy, and action buttons to save, preview, or archive the content. **Note:** If your policy has not yet been published, the "Preview Last Published" action button will not be available.

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

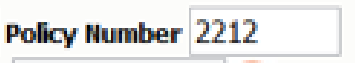
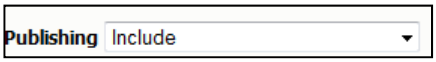


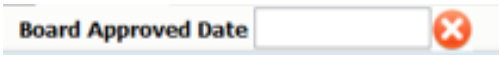
Editing Policies: The Toolbar

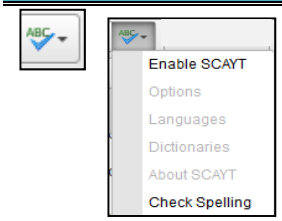
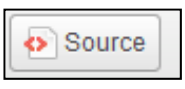
When adding or editing content, you will be in an editing environment that is similar to MS Word. The Toolbar has many of the same tools that are used in Word.

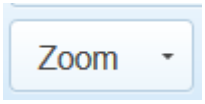
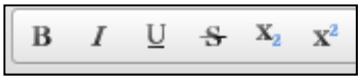


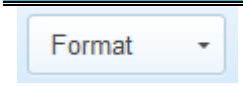
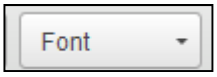
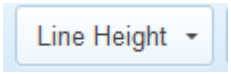
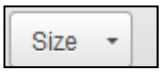
The following section outlines the functions of each item in the Toolbar. Hovering your mouse over each toolbar icon will bring up a label with information about the tool.

Icon	Function
	Policy Name. The title of the Policy. This can be updated at any time.
	**Policy Number.** This numbers the policy and determines the order in which the policy appears within the Chapter. While the system does not prevent you from changing the Policy Number 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.
	**Publishing Setting.** This allows you to determine if a policy will be included or not included in the published manual. You can also include a previously published version if your policy is currently being edited. For more information on publishing, see page 37.
	Revised Date. Click in this field to open a calendar that allows you to select the Revised Date for the policy. The Revised Date will appear below the title of the policy in the published manual. See page 34 for information on updating the Revised Date for multiple policies at one time. Click to remove the Revised Date.

Icon	Function
	Reviewed Date. Click in this field to open a calendar that allows you to select the Reviewed Date for the policy. The Reviewed Date will appear below the title of the policy in the published manual. See page 34 for information on updating the Reviewed Date for multiple policies at one time. Click to remove the Reviewed Date.
	**Board Approved Date.** Click in this field to open a calendar that allows you to select the Board Approved Date for the policy. The Board Approved Date will appear below the title of the policy in the published manual. See page 34 for information on updating the Board Approved Date for multiple policies at one time. Click to remove the Board Approved Date.
	Cut, **Copy** and **Paste.** These are common editing icons to Cut, Copy, and Paste text. It is recommended when pasting to choose one of the other Paste options noted below.
	Paste As Text. This icon will paste text into the content as Plain Text with all formatting removed from the pasted text. This paste method often is used when pasting from Word to CU PolicyPro.
	Paste from Word. This icon will paste text into the editor while stripping certain formatting 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.
	Undo and **Redo.** These are standard icons which allow users to “undo” or “redo” multiple steps.
	Find. This allows you to search the current policy for specific text.
	Replace. This allows you to search the current policy for specific text and replace it with new text.
	Select All. This will select all text in the content editor.

Icon	Function
	**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 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.
	Add Link, Remove Link and Anchor. These icons are generally used for editing web content, and are not typically used when editing policies in CU PolicyPro.
	Insert/Edit Graphics. This icon inserts a graphic image into the content. Images are not typically inserted into CU PolicyPro policies.
	Insert/Edit Table. Inserts a table into a policy or allows editing of an existing table. See page 27 for more information on Tables.
	Horizontal Line. Places a horizontal line in the content editing area.
	Special Character. 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).
	Insert Footnote. Allows the user to insert a footnote into the 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. This icon are generally used for editing web content, and is not typically used when editing policies in CU PolicyPro.
	**Source.** 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.

Icon	Function
	**Zoom.** Allows you to view the text in the content editing area larger or smaller without changing the size of the other elements on the screen.
	Transform Text Switcher. This button will rotate the case of highlighted text between lower case, UPPER CASE and Title Case with each click.
	Transform Text to Lowercase. This button change the case of all highlighted text to lower case.
	Transform Text to Uppercase. This button change the case of all highlighted text to UPPER CASE.
	Capitalize Text. This button change the case of all highlighted text to Title Case (first letter of each word capitalized).
	**Bold**, **Italic, Underline, Strikethrough, Subscript** and **Superscript.** Common editing items to format text.
	Remove Formatting. Removes all formatting from any highlighted text.
	Numbering and **Bullets.** Standard icons used to apply numbering and bullet formats. See page 23 for more information on applying these styles.
	Increase and Decrease 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.
	Left, Right Center and Block Justify. Standard formatting tools used to align paragraphs of text.
	Formatting Styles. This icon applies pre-set styles to blocks of text. It is not commonly used in CU PolicyPro. To remove Formatting Styles, use the "Remove Formatting" icon. This tool is similar to the "Paragraph Styles" tool.

Icon	Function
	**Paragraph Styles.** This icon applies pre-set styles to blocks of text. This will apply the selected style to the entire paragraph. It is not commonly used in CU PolicyPro. To remove Paragraph Styles, use the "Remove Formatting" icon. This tool is similar to the "Formatting Styles" tool.
	**Font Style.** Standard formatting tool to allow changes to font style. Most users choose to use the default font style.
	**Line Height.** This determines the amount of spacing between each line of text. This is typically set to 1.
	**Font Size.** Standard formatting tool to allow changes to font size. Most users choose to use the default font style.
	Text Color. Allows color changes to highlighted text. Click the dropdown arrow to see the color choices.
	Background Highlighting. Highlights behind text. Click the dropdown arrow to see the color choices.
	Start Tracking Changes. Click this icon to track changes made in the content of the policy. Once changes are made, all changes must be either accepted or rejected in order to turn off "Track Changes" mode.
	Hide/Show Tracked Changes. This icon will toggle the tracked changes to show or not show. This icon will not accept or reject the tracked changes.
	Accept All Changes. This icon will accept all changes made in the policy in tracked change mode.
	Reject All Changes. This icon will reject all changes made in the policy in tracked change mode.
	Accept Change. This icon will accept a single change made in the policy in tracked change mode. Your cursor must be positioned within the change to accept it.
	Reject Change. This icon will reject a single change made in the policy in tracked change mode. Your cursor must be positioned within the change to reject it.

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.

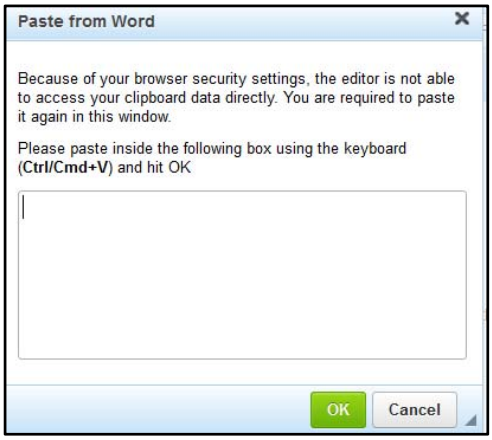
Text can also be copied/pasted from other sources, such as MS Word or Excel. When pasting from another source, it **is recommended to use either the "Paste from Word" icon or the "Paste as Plain Text" icon.** See below for more information on using these icons.

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 your copied content into the box.



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 issues.

   The following items are the most common formatting items that may need to be reformatted after pasting in from Word:

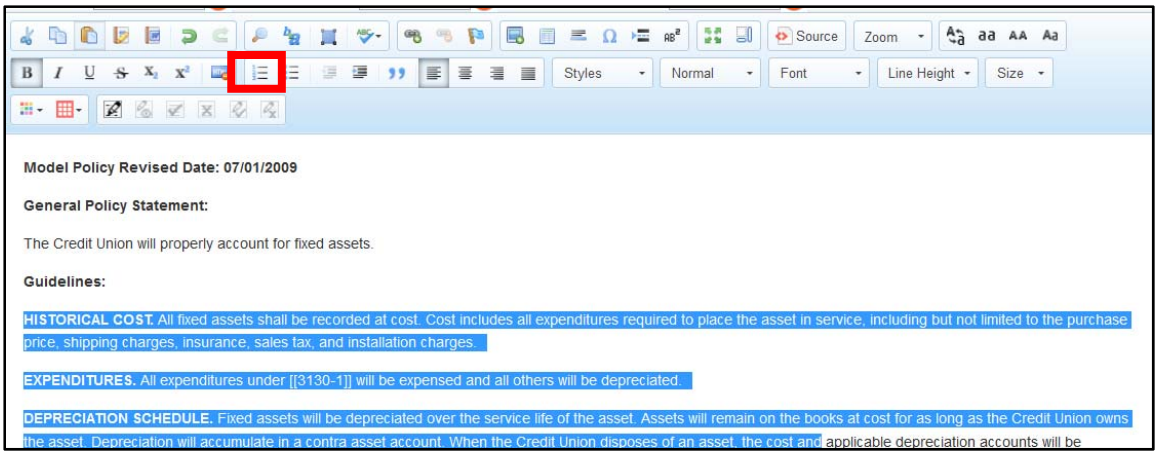
   - **Bullets and numbering**. The system may bring in the bullets/numbering as text. The bullet or numbering style will need to be reapplied, and the added text bullets or numbers will need to be removed.
   - **Columns**. If columns were set up in Word, the column structure may not be retained. Tables may need to be added to recreate the columns. See page 27 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 in the CU PolicyPro Manual use numbered lists. **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 explanations 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.

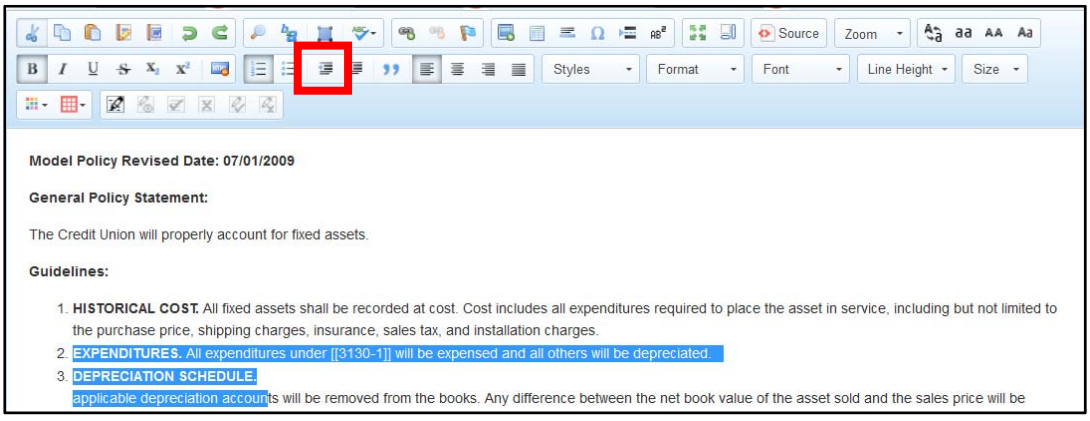


Creating a Sublist in an Existing Numbered List

1. Numbered list formatting must already be applied to the content in order to create a sublist.

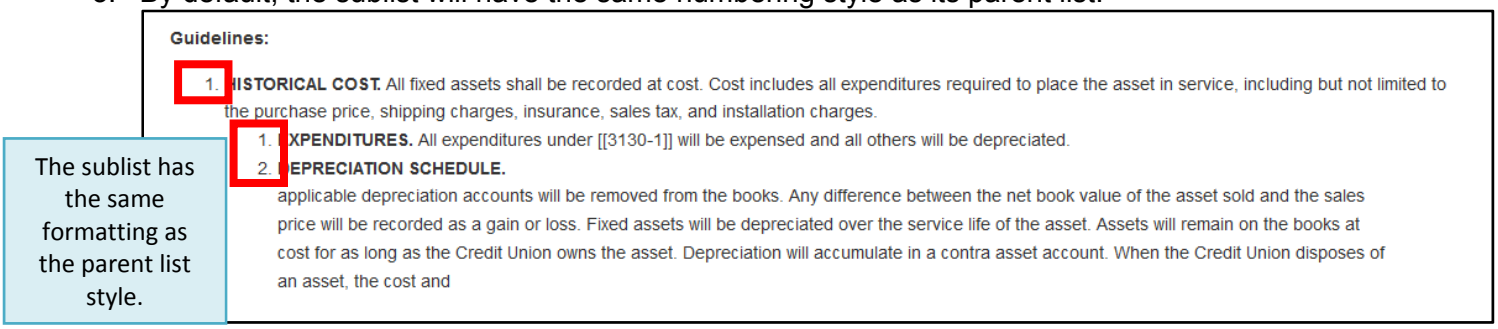
2. To create a sub-list, highlight the text that should be indented, and use the "Increase Indent" icon, which has an arrow pointing to the right. **Note:** If you are at the first level of the numbered list, using "Decrease Indentation" will take the numbered list formatting off of your highlighted text.

   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.

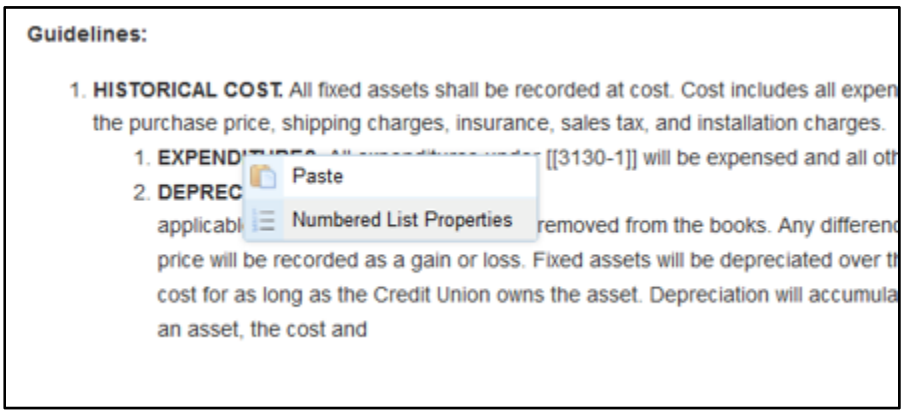


Creating a Sublist in an Existing Numbered List (continued)

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

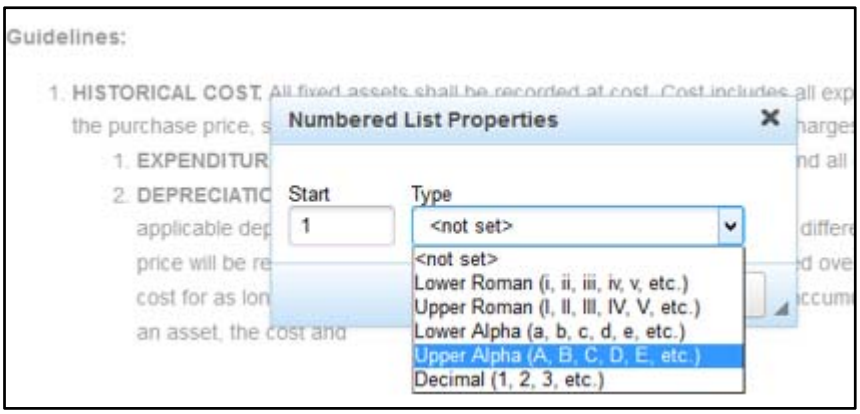


4. To change the style of the sublist, highlight any part of the sublist, **right click** on the highlighted text, and choose "Numbered List Properties".



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 to 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 to 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. Press 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 "Increase Indentation" or "Decrease Indentation" icons.

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

    b. If the item should be in a parent position (needs to outdent to the left), use the "Decrease Indentation" icon with the left arrow. The left "Decrease Indentation" icon can be used more than once if you are several levels deep in the sublist and the item needs to move more than one position to the left.

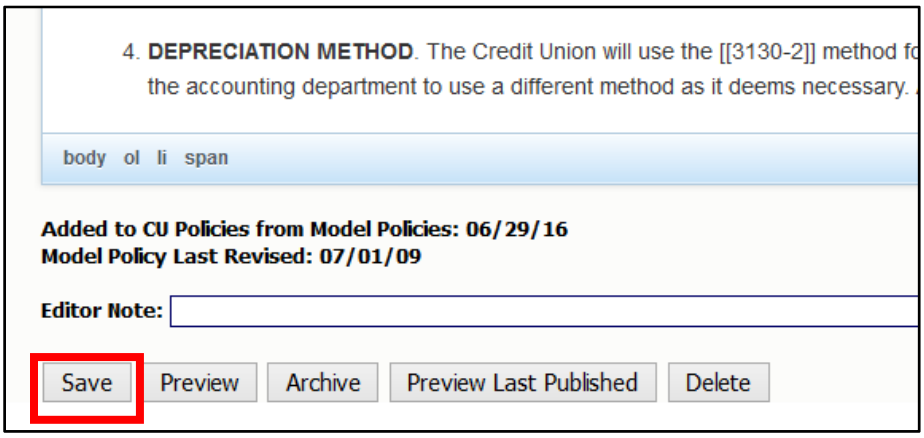
    c. Once the item is in the correct position, move on to Step 5.

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. You can change the style of the sublist to something else if you prefer. See page 21 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.

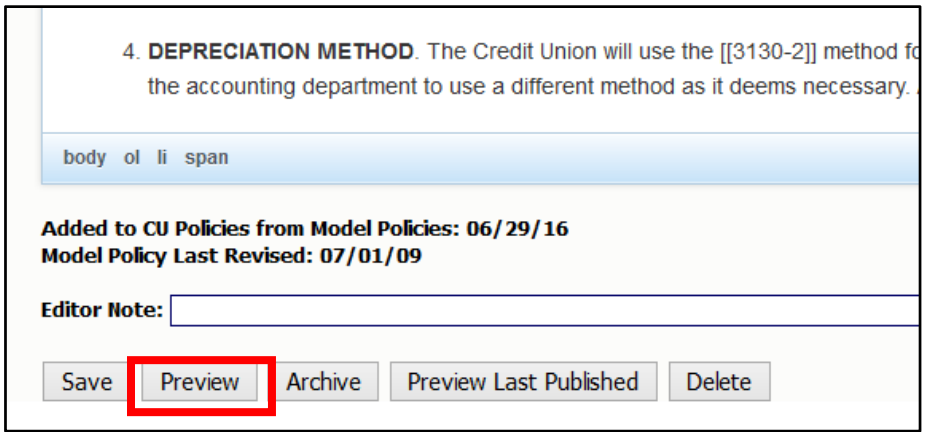
Saving Policy Edits

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



Previewing Policy Edits

1. Click the “Preview Working” Button directly below the content editor to open a new window with a preview of the policy.



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 fields, 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.

Inserting Tables

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

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. These are prefilled with default settings that can be changed. Below is some guidance on the most commonly used table properties:

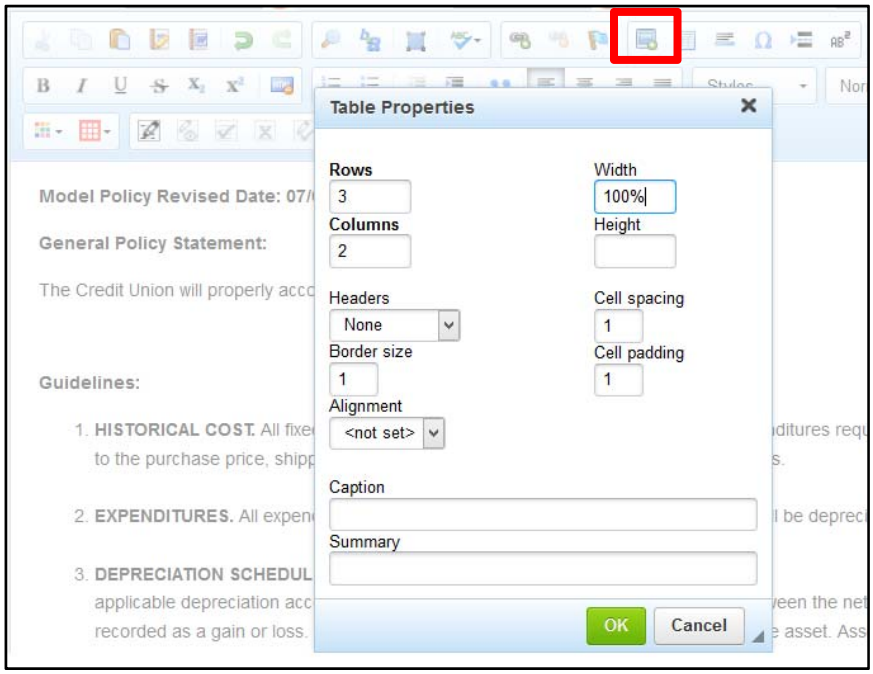
   Rows: The number of rows for your table.

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

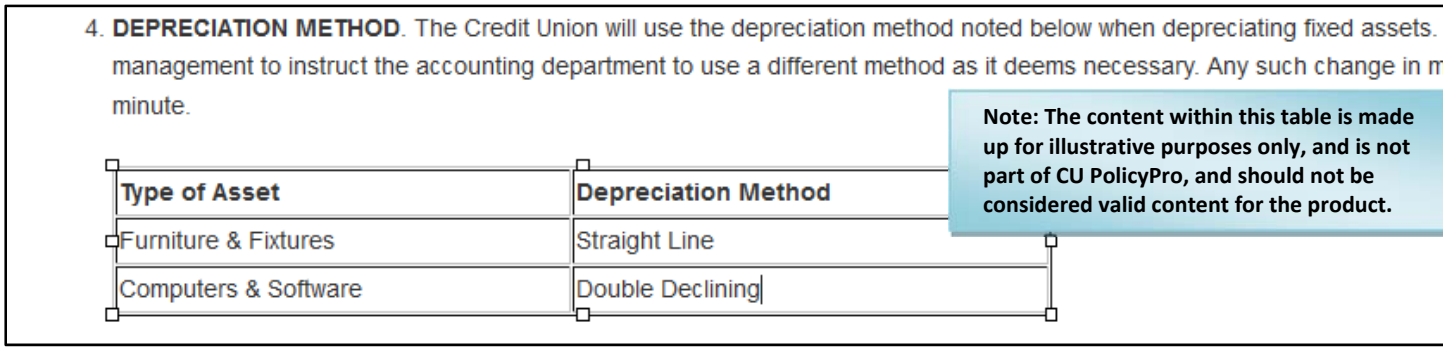
   Width: The width of the entire table. While the default is 500 pixels, we recommend changing this to a percentage. Choose a number (usually between 50-100) and include the percentage sign.



5. When you have set your table options, click “OK” to insert your table.

Inserting Tables (continued)

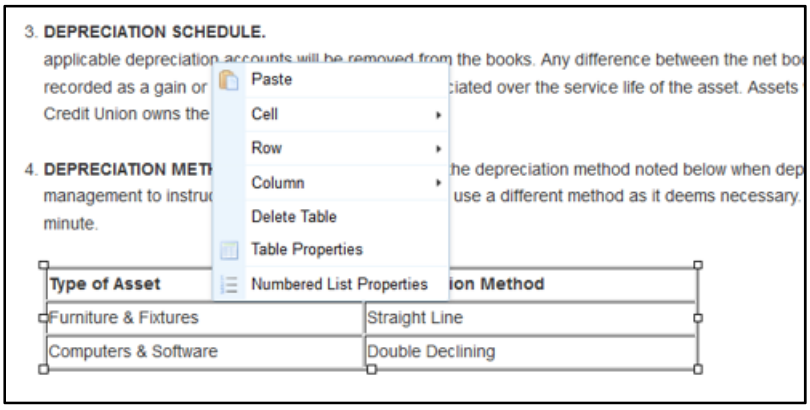
6. Once the table is inserted, place your mouse in any cell and type or copy/paste in your content. For copy/paste, it is recommend to **paste as plain text**. Any formatting that can be done on text can be done on text within the table.



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 add rows above or below the current row.

4. Use the "Column" option to add or remove columns. Place your cursor in a current column, and add columns to the 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 #2 above).

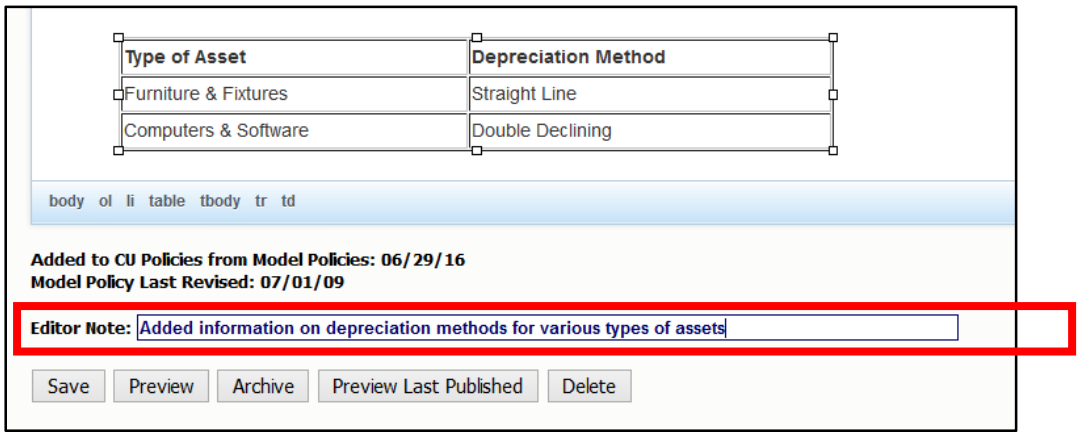
Using Editor Notes

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 50 for more information on the Policy Notes Report.

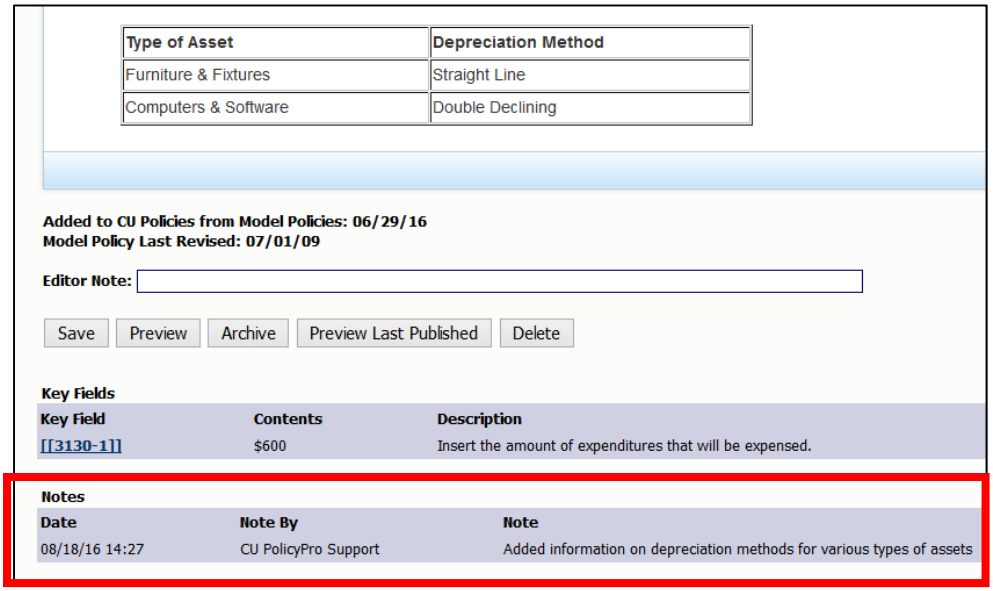
Editor notes can be used to document what has been customized for a particular policy, or to document who made certain updates or changes to a policy. Organizations often use this documentation to determine how much custom content is included in any given policy versus the use of the model content, or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

1. To add an Editor Note, type your comment in the "Editor Note" field.

2. Save the policy. **Tip: The Date and User Name will automatically be included with the Note, so it is not necessary to include this in the Note content.**



3. Once the note is saved, the most recent five Editor Notes will show below the content. View the "Policy Notes Report" to see all Editor Notes if there are more than five.



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Key Fields Content

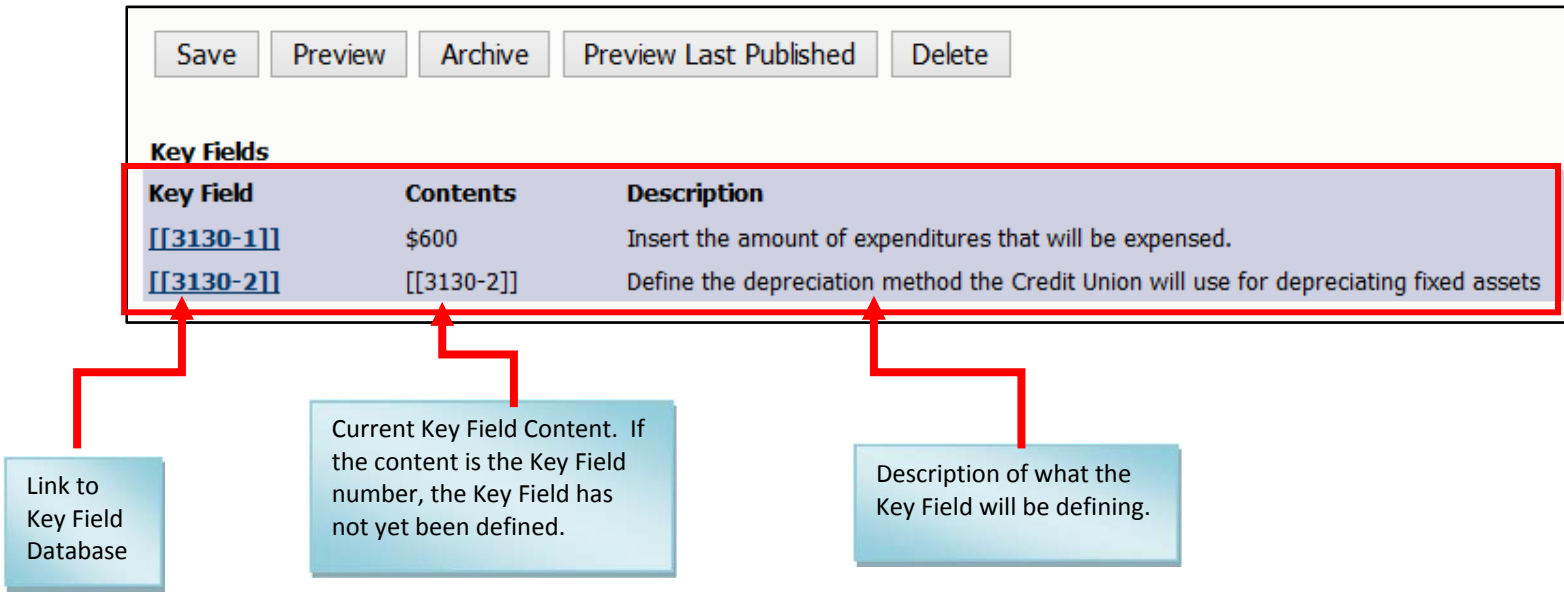
CU PolicyPro model policy content includes a series of *Key Fields* to assist with customization of the model policies. Key Fields are bits of information which are important to completing the policy, but will vary from organization to organization. An example of a Key Field would be the dollar threshold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

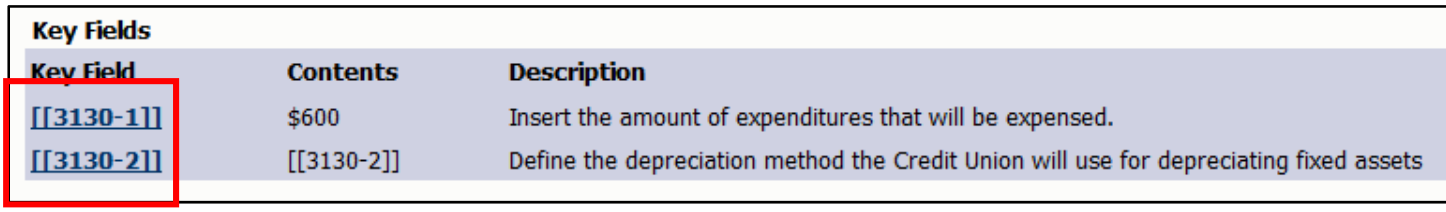
1. Click on the "CU Policies" tab at the top left of the screen to make sure you are in the CU Policies manual.

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.

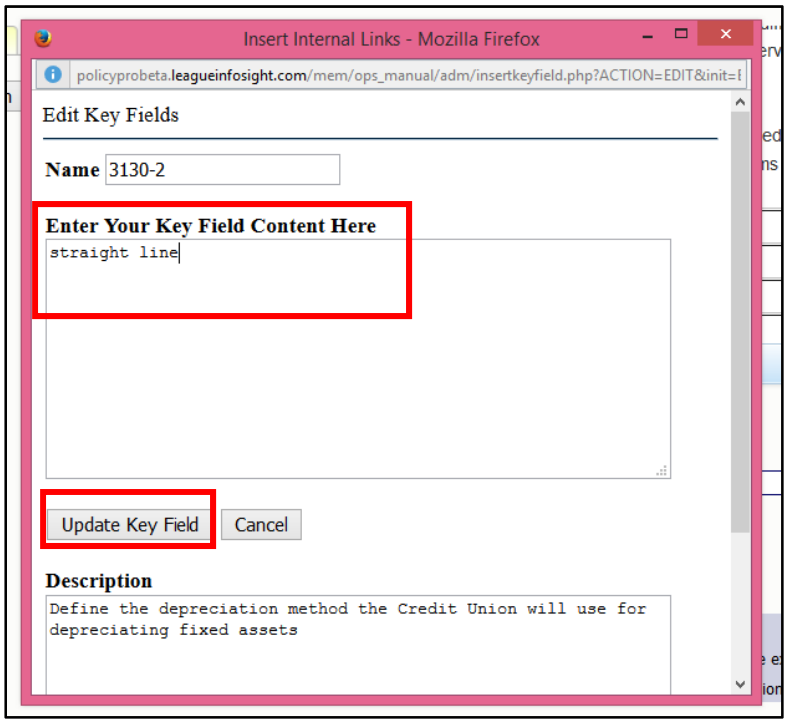
4. Go to the Key Fields area below the policy content, and click on the link to the Key Fields database.

Link to Key Field Database



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

6. Click the "Update Key Field" button to save your changes.

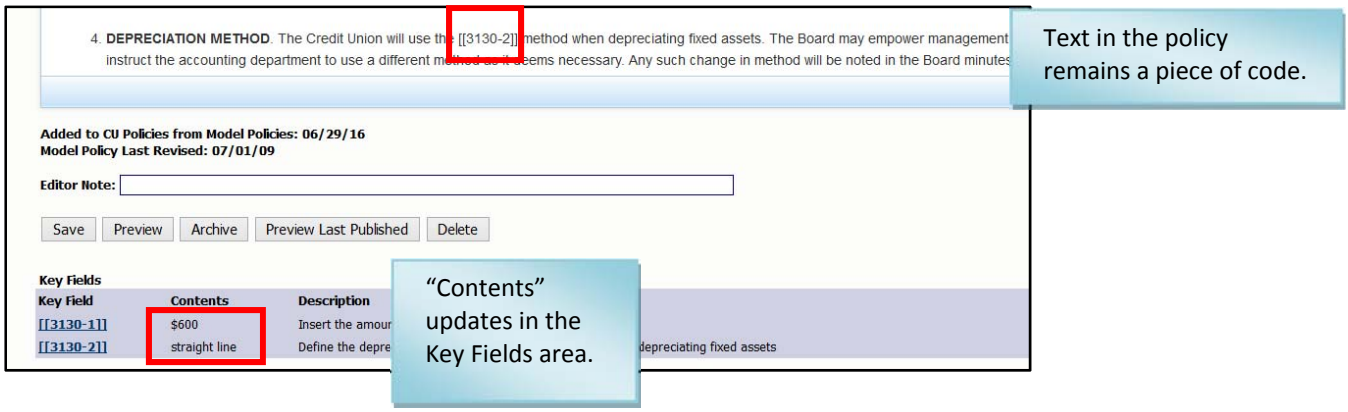


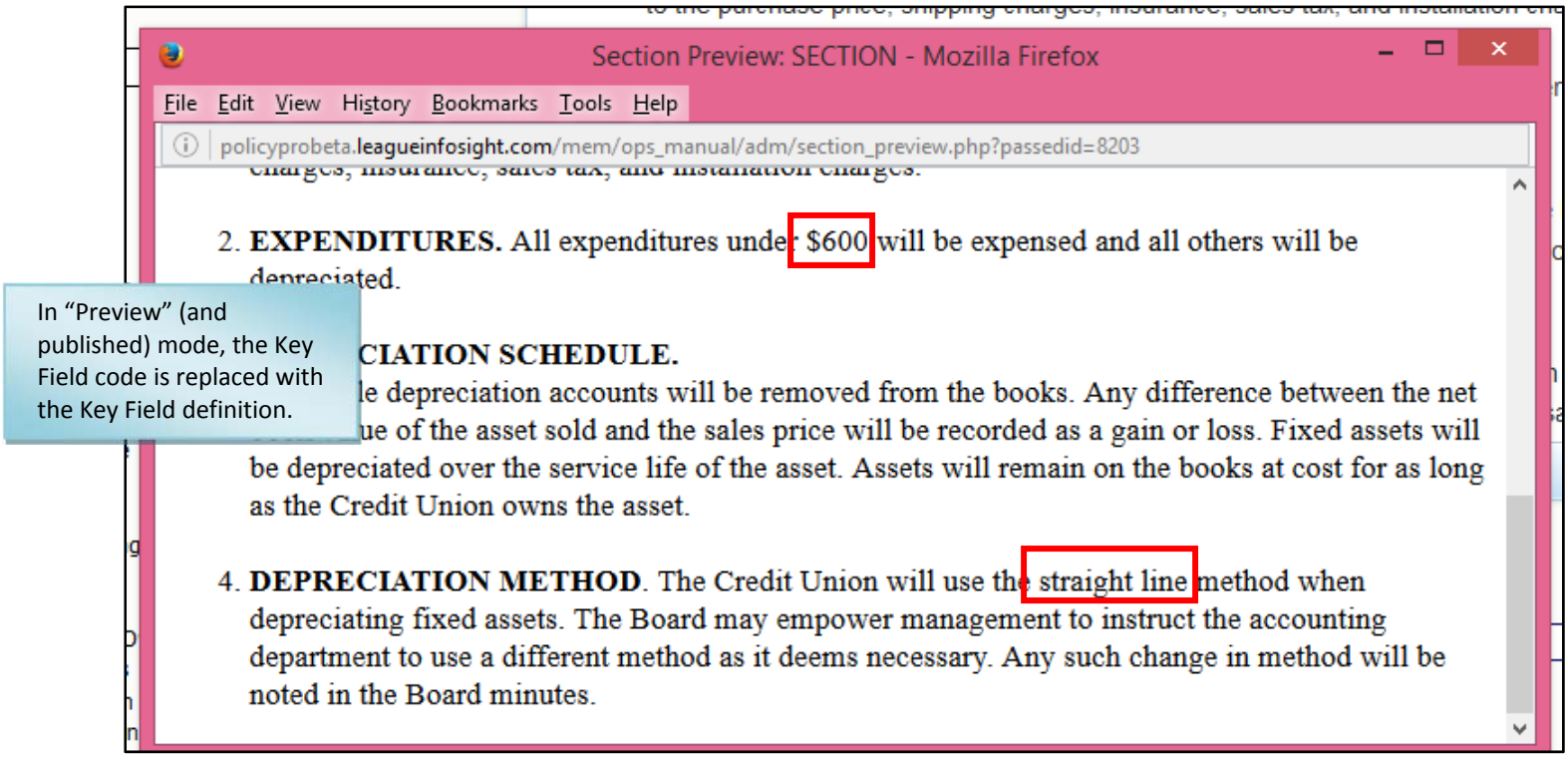
Define Key Fields at the Individual Policy Level (Continued)

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

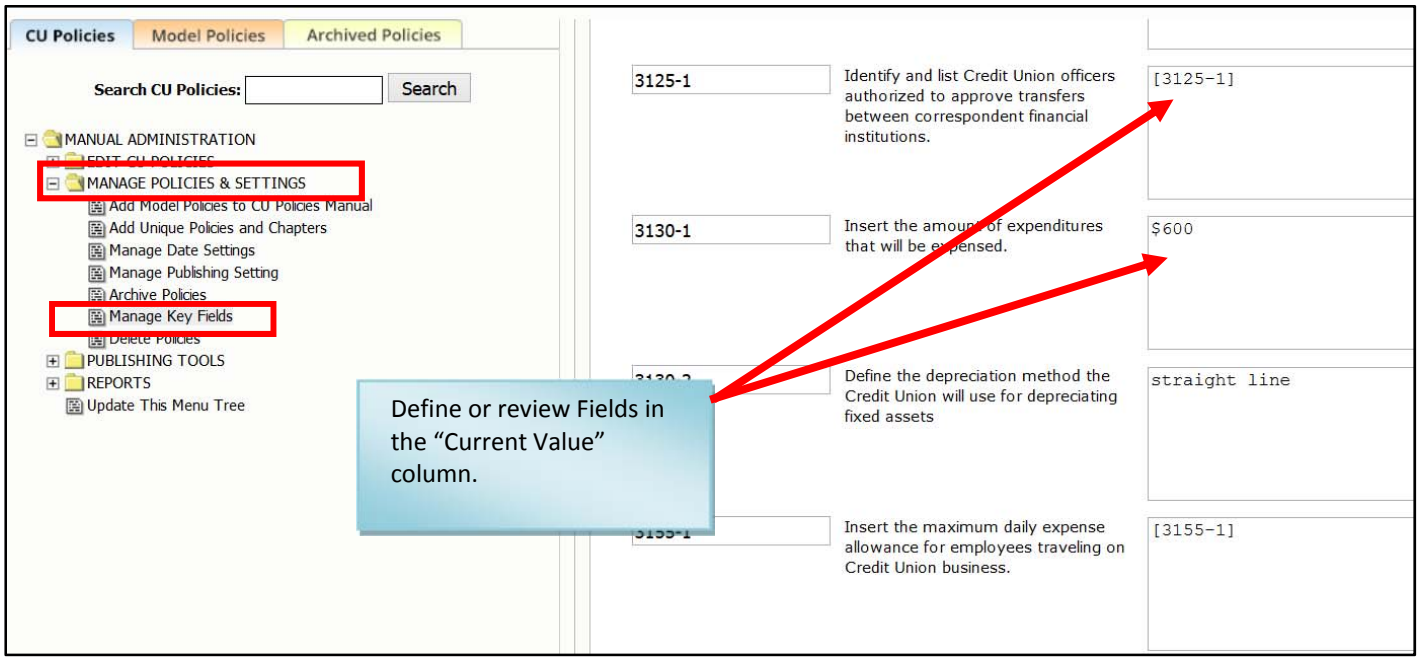
1. Click on the “CU Policies” tab at the top left of the screen to make sure you are in the CU Policies manual.

2. Using the plus signs to the left of each folder, expand the “MANUAL ADMINISTRATION” and the “MANAGE POLICIES & SETTINGS” folders.

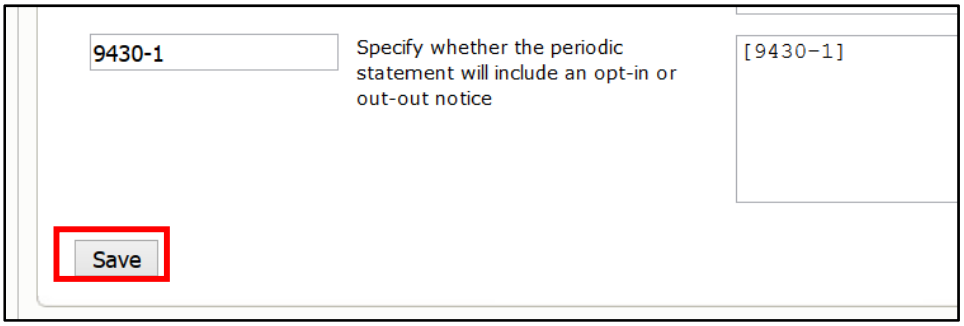
3. Click the “Manage Key Fields” link under the “MANAGE POLICIES & SETTINGS” folder.

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.



Managing Dates

The Revised, Reviewed or Board Approved dates can be managed at the individual policy level or for multiple policies at one time.

Manage Dates for multiple policies at one time.

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

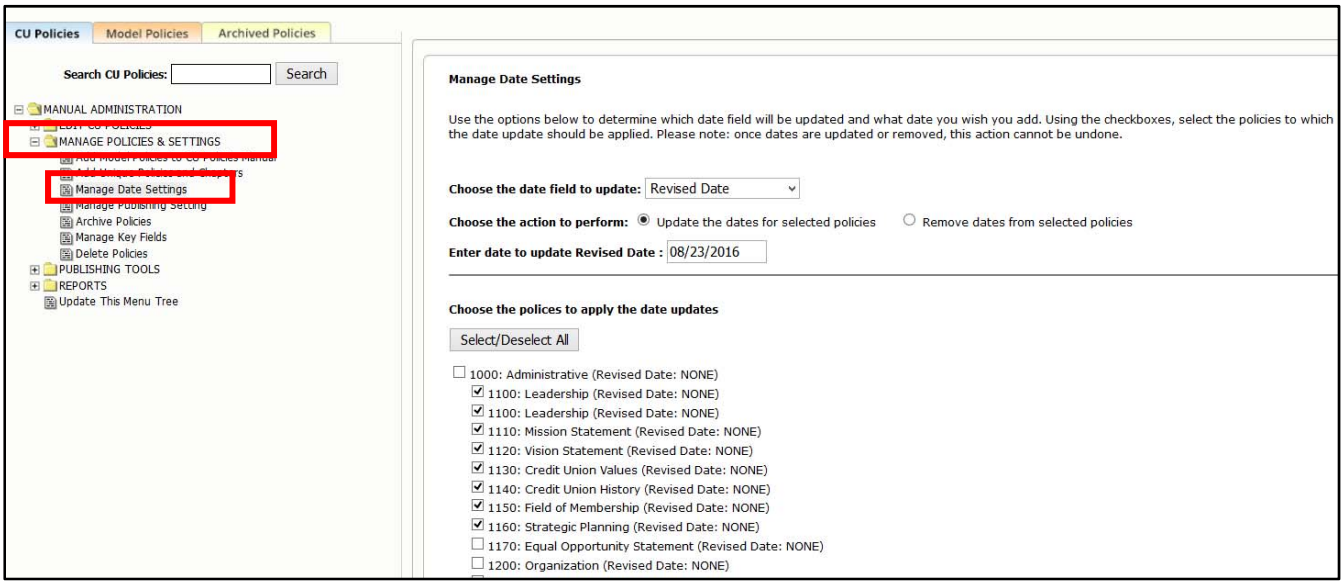
2. Using the plus signs to the left of each folder, expand the “MANUAL ADMINISTRATION” and the “MANAGE POLICIES & SETTINGS” folders.

3. Click on the “Manage Date Settings” link in the “MANAGE POLICIES & SETTINGS” folder.

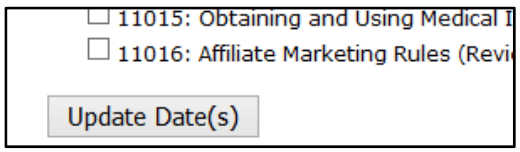
4. On the right side of the screen, some date setting options and a full list of all policies in the CU Policies manual will appear, with a checkbox next to each policy.

5. Using the date setting options, choose from the dropdown to update the Revised, Reviewed or Board Approved Date, choose if you want to add the date or remove the date for the selected date field on the selected policies, and choose the date to be applied to the selected date field on the selected policies.

6. Use the checkboxes next the policies to choose which policies will have the date settings applied. The current date associated with each policy for the selected date field will show next to the policy.



7. When all date settings and policies are selected, scroll to the bottom of the screen and click the “Update Date(s) button to save your changes. To change all three dates, this process must be completed three times.



Deleting Policies from the CU Policies Manual

A policy can be deleted one of two ways: At the individual policy level, which allows you delete a single policy, or using the Delete Policies utility, which allows you to archive multiple polices at once.

Option 1: Delete multiple policies at one time.

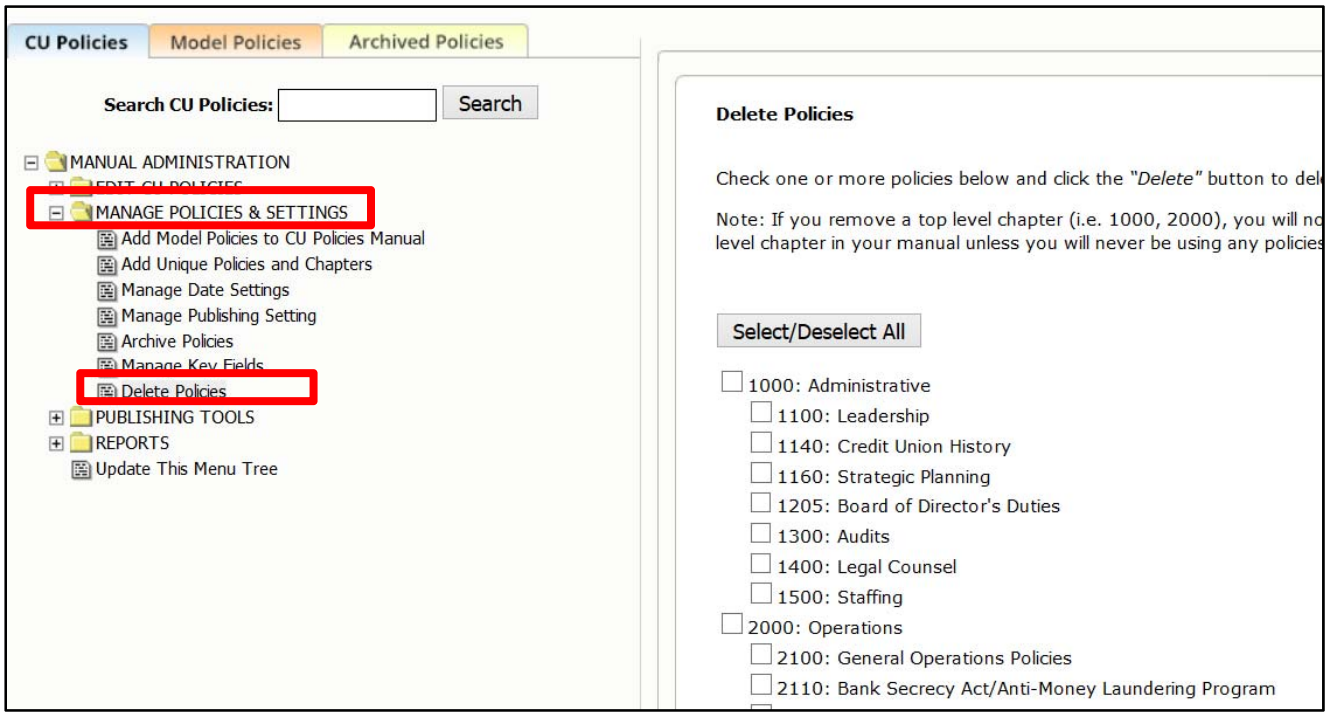
8. Click on the "CU Policies" tab at the top left of the screen to make sure you are in the CU Policies Manual.

9. Using the plus signs to the left of each folder, expand the "MANUAL ADMINISTRATION" and the "MANAGE POLICIES & SETTINGS" folders.

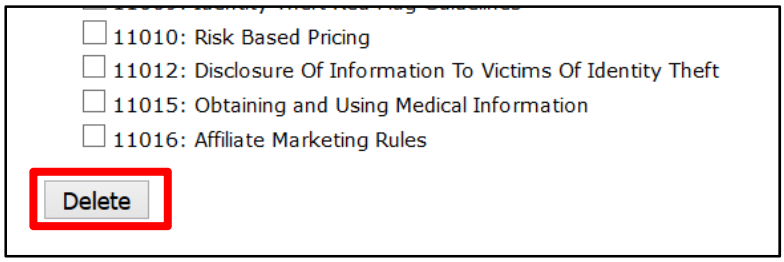
10. Click on the "Delete Policies" link in the "MANAGE POLICIES & SETTINGS" folder.

11. On the right side of the screen, a full list of all policies in the CU Policies will appear, with a checkbox next to each policy.

12. Click the checkbox next to each policy you want to remove.



13. Scroll to the end of the page and click the "Delete Selected Sections from Manual" button.



14. A confirmation box will pop up, and once confirmed, the selected policies will be removed from your CU Policies.

15. Policies that are removed by mistake can be restored by the CU PolicyPro support staff. Contact policysupport@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 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 CU Policies. They will, however, appear in the published manual.

Instructions Continue on the next page.

The Publishing Process

Each policy in the CU Policies 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 CU Policies manual but simply outputs the content to an electronic document. Publishing is a point-in-time process – all content in the published manual is as of the point it was published. If changes are made to any policy after it is published, those changes will not flow down to the published manual. You must re-publish in order to see any new changes.

The recommended steps for publishing are:

1. Review and, if necessary, update the "Publishing" settings.
2. Publish the Manual.

Published Documents Default Font

You can choose the default font for your published manual, including the font style, and the header and body font sizes. This setting is managed in the Administration area of CU PolicyPro. Please see page 65 for more information.

The "Publishing" Setting

For any given publish, you can choose to include or not include any policy from the CU Policies manual by adjusting the "Publishing" Setting. You can also choose to include the most recently published version (if available) if the CU Policies manual version is in the process of being updated but you don't want to include the changes yet. The "Publishing" Setting is a dropdown box found in the Toolbar area of each policy and can also be adjusted in the "Manage Publishing Settings" utility.

By default, the "Publishing" Setting on each policy will be set to "Include." Once changed to "Do Not Include" or "Include Last Published Version", that setting will remain until it is manually changed.

Important Note! The "Publishing" Setting works differently for policies than for chapter pages.

If the "Publishing" Setting is set to "Include" on a **specific policy**, the policy will be **included** in subsequent published manuals. If the "Publishing" Setting is set to "Do Not Include" on a **specific policy**, the policy will be **excluded** from any subsequent published versions. If the "Publishing" Setting is set to "Include Last Published Version" on a **specific policy**, the policy will **include the last published version,** regardless of what is currently in the CU Policies manual for that policy. Once set, the "Publishing" Setting will not change unless manually changed at the policy level or through the "Manage Publishing Settings" utility.

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

The "Publishing" Setting can be applied either to specific policies or chapter pages in one of two ways: 1) At the individual policy level, which allows you manage the publishing setting for a single policy or chapter page, or 2) using the "Manage Publishing Settings" utility, which allows you to manage the publishing setting for multiple polices and/or chapter pages at once.

Managing the Publishing Setting for a Single Policy or Chapter Page

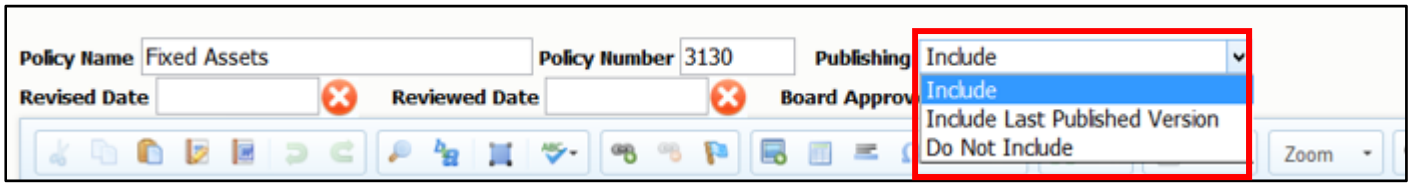
1. Click on the “CU Policies” tab at the top left of the screen to make sure you are in the CU Policies manual.

2. Using the plus signs to the left of each folder, expand the “MANUAL ADMINISTRATION” and the “EDIT SECTIONS OF CU POLICIES” folders.

3. Open the policy or chapter page on which you wish to modify the “Publishing” Setting.

4. Use the dropdown box to determine the setting. “Include”, “Do Not Include”, or “Include Last Published Version”. This setting will be retained until it is manually changed. Remember that if the chapter page is set to “Do Not Include”, it will exclude all of the policies in the chapter from publishing, regardless of the individual policy settings.

5. Save the policy to save the setting.



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

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 on the “Manage Publishing Settings” link in the “MANAGE POLICIES & SETTINGS” folder.

4. On the right side of the screen, a full list of all policies in the CU Policies manual will appear, with the publishing setting options next to each policy.

5. By default, new policies in the manual will be set to “Include”. If any policy has previously had the publishing setting changed, the radio button next to that policy will indicate the current publishing setting. Any chapter page that has been set to “Do Not Include” will have a checkbox next to the chapter page.

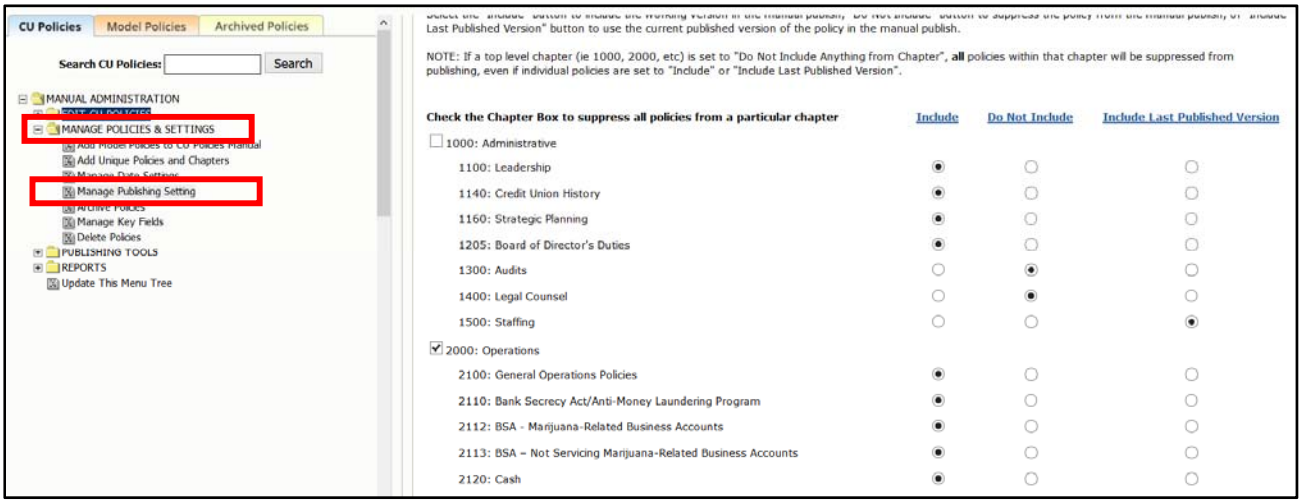
6. Review the current settings for each policy/chapter page, and make sure they are set correctly. Remember if the chapter page is set to “Do Not Include”, it will exclude all of the policies in the chapter from publishing, regardless of the individual policy settings.

Setting the Publishing Setting for Multiple Policies and/or Chapter Pages (continued)

In the screen shot example below, for chapters 1000-2000, the following settings have been applied:

- Chapter 1000 – The chapter page (1000) is unchecked, the first four policies are set to “Include”, policies 1300 and 1400 are set to “Do Not Include” and policy 1500 is set to “Include Last Published Version.” Therefore, the current CU Policies version of the first four policies will be included in the publish, policies 1300 and 1400 will not be included in the publish, and policy 1500 will include the last published version rather than the content currently showing in the CU Policies manual.

- Chapter 2000 - The chapter page (2000) is checked. Therefore, because the top level chapter page 2000 has been checked, it will override the individual policy settings and all policies from Chapter 2000 will be excluded from the publish.



7. Once you have reviewed and adjusted the “Publishing” setting for all policies/chapters, scroll to the end of the page and click the “Save” button.

   Note: If you change the setting for a policy in the “Manage Publishing Settings” utility, that setting will be retained until it is manually changed.

Important Notes:

- The Last Published version is determined by policy number. Please note that if the CU Policies manual has two or more policies with the same policy number, the last published version will be the same for all policies with that number. We recommend that all policies have a unique number.

- If a policy has a last published version and is removed from the CU Policies, and a new policy is added with the same policy number, the Last Published version of the deleted policy will be available until the newly added policy is published for the first time.

Creating a Published Manual

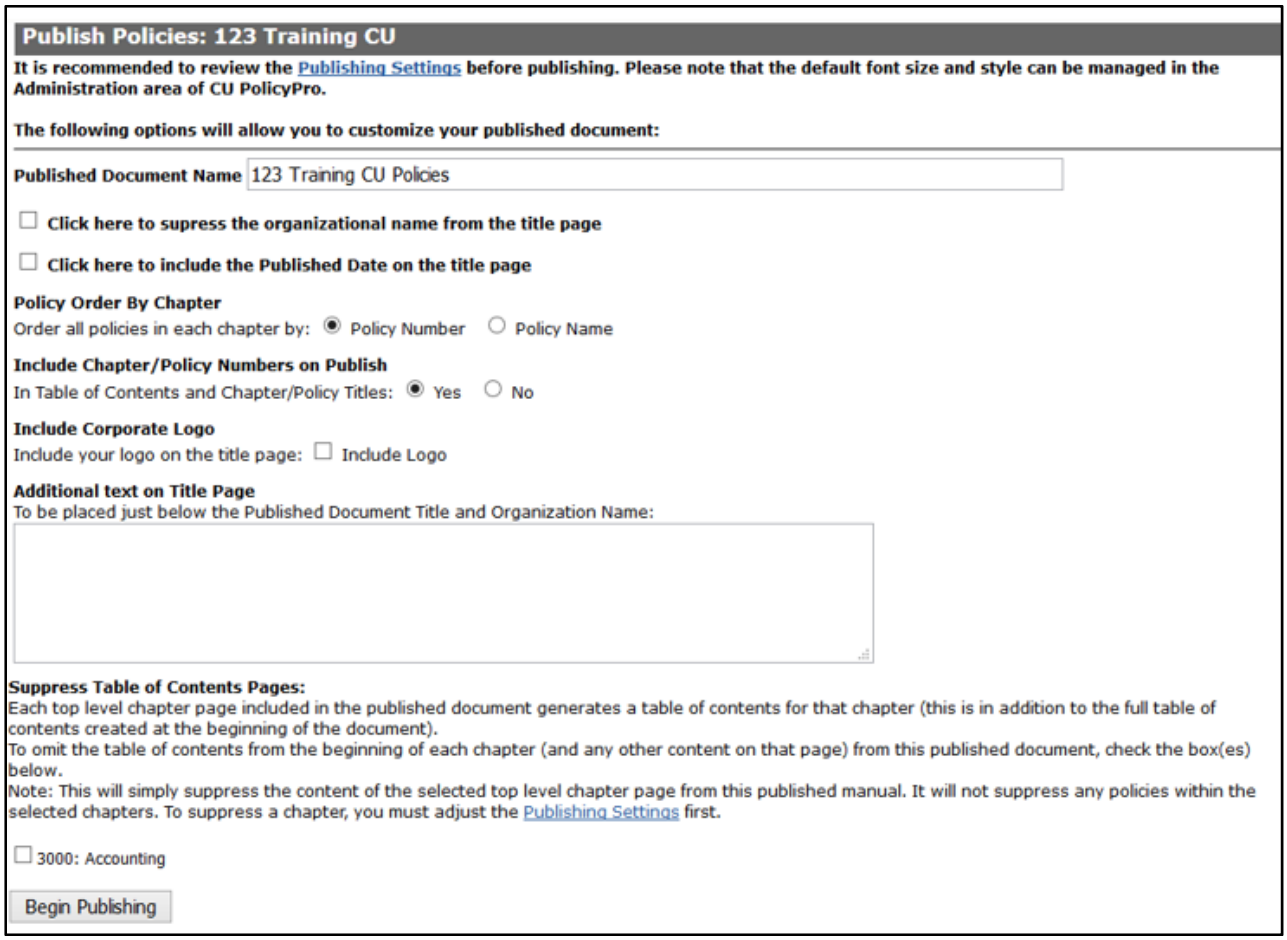
Before publishing, you should ensure that all “Publishing” settings have been applied. See previous section for more information.

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

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 Policies” link in the “PUBLISHING TOOLS” folder.

4. On the right side of the screen, a series of options are presented to customize your published manual. See screen shot below. See next page for a description of what each option will do.



Publishing the CU Policies (continued)

Published Document Name: This will be the title of the published document. By default, the name of the CU Policies manual will be prefilled in this field (this is usually "Operations Manual" unless you have renamed the CU Policies manual). It is recommended that if you are not publishing the entire manual to be specific when titling your manual (i.e. Accounting Policies, Policies for Board Review on 5-15-16, Lending Policies Revised 5/17/16, 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.

Click here to include the Published Date on the title page: Because publishing is a point in time process, some credit unions prefer to have the published date listed on the title page as a reference. Checking this box will add the Published Date to the title page.

Policy Order by Chapter: This setting allows you to determine how the policies will be ordered within each chapter. The choices are by policy number or alphabetical by policy name. The Chapters themselves will always remain in numerical order. This setting only applies to the policies within the Chapters.

Include Chapter/Policy Numbers on Publish: This setting allows you to determine if the Chapter and Policy Numbers will show next to the policy title. Typically organizations set this to "Yes" if the policy order is by policy number, and to "No" if the policy order is alphabetical by policy name.

Include Corporate Logo: This option is only available if a Corporate Logo has been uploaded. (See page 66 for information on uploading your logo). If checked, the logo will appear on the title page of the published manual.

Additional Text on Title Page: This allows the user to add more information on the title page of the manual. It is recommended to put the date of publishing in this box, along with any other information relevant to the set of policies being published. Example: This published manual contains 8 policies that were revised and published on 5/14/16.

Select the Chapter Pages to Suppress in Publishing: Each top level chapter page included in the published document generates a table of contents for that chapter (this is in addition to the full table of contents created at the beginning of the document). Checking this option will omit the table of contents from the beginning of each chapter (and any other content on the chapter page) from the published document.

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 the chapters listed you do not see a chapter listed, but you did expect to have policies from that chapter, it is a good indication that you need to revise the "Publishing" settings.

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

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

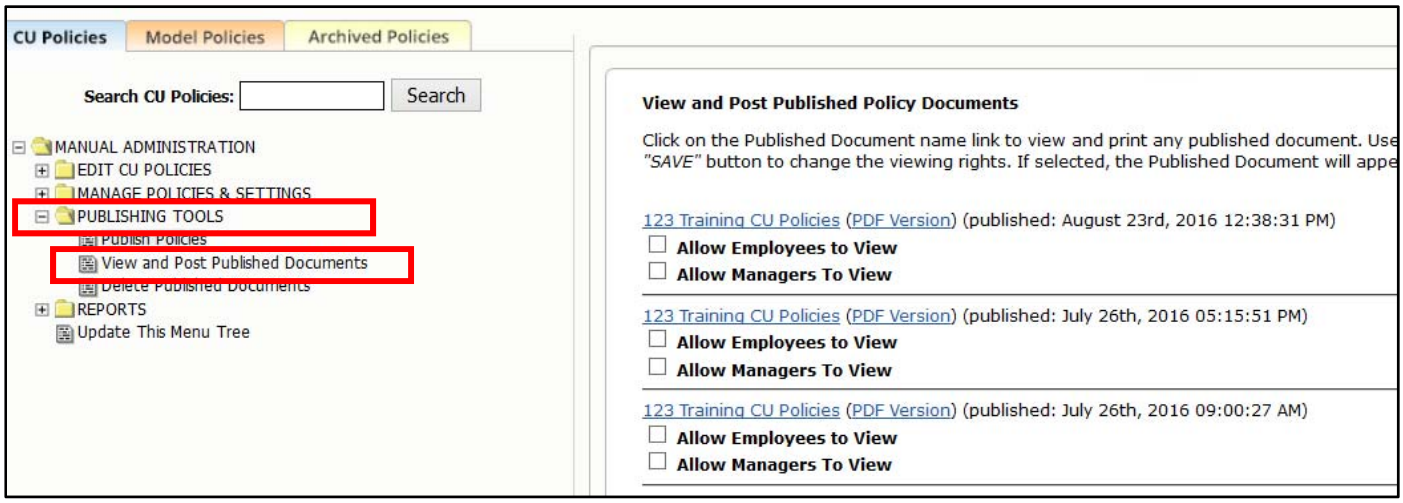
7. When the manual is published, you will be taken to the "View and Post Published Documents" area. The document you just published, as well as any other previously published manuals, area available in this area.

View, Print and Post Published Manuals

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

2. Using the plus signs to the left of each folder, expand the “MANUAL ADMINISTRATION” and the “PUBLISHING TOOLS” folders.

3. Click on the “View and Post Published Documents” link in the “PUBLISHING TOOLS” folder. **Note:** If you have just published a manual, you will be automatically directed to the “View and Post Published Documents” area.



4. The “View and Post Published Documents” area lists all published manual versions in date order, with the most recently published version at the top of the list. Published Manuals will be provided as both an HTML version (to read online) and as a PDF. 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 to open an HTML version, or the PDF Version link to open the document as a PDF.

2. To print the manual, from the HTML version, click on the “Print” button in the top left corner to print the published manual. From the PDF Version, use your PDF viewer tools to print the manual. See Appendix B for Printing Tips.

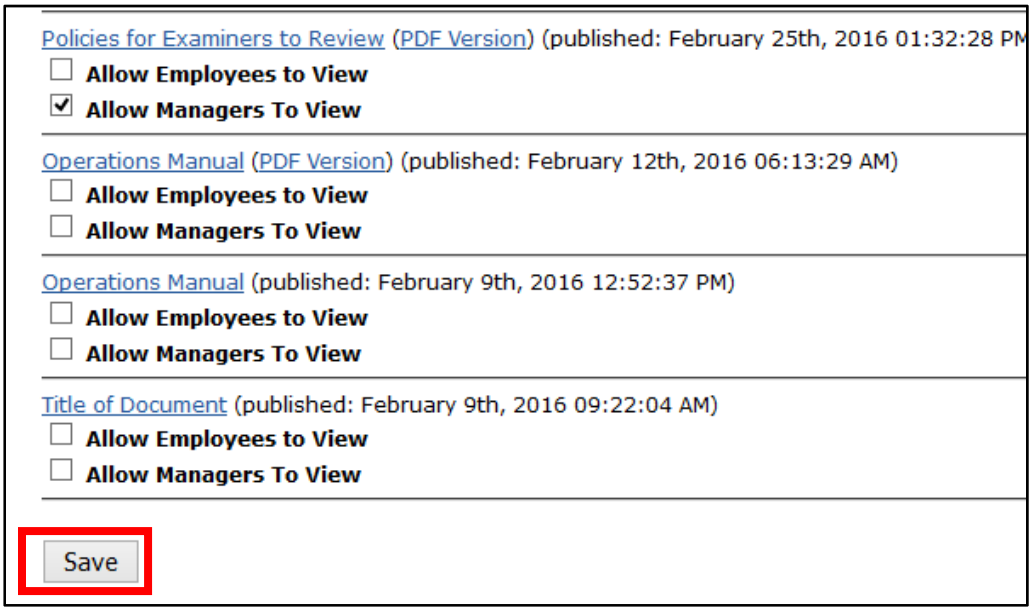
Posting Published Manuals on the Home Page

Links to published manuals can be made available on the Home Page, within the “Manager Manuals” and/or the “Employee Manuals” folders. Remember, the “Employee Manuals” folder is available to anyone from the organization with an 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 organization and does not need to also be placed in the “Manager Manuals” folder.

2. Click the “Save” button at the bottom of the page when finished.



Removing Published Manuals from the Home Page

1. To remove a manual from the home page, unclick the “Allow Managers to View” and/or the “Allow Employees to View” checkbox.

2. Click the “Save” button when finished.

Additional Notes About Publishing

Publishing is a point in time process. When policies are published, the system will take a copy of the content in the CU Policies manual for the selected policies (or the content from the previously published manual, if selected), and put that content into the published manual document. Subsequent changes to policies the CU Policies manual will not flow to the published manual. You will need to re-publish in order to see any new changes.

Deleting Published Manuals

1. Click on the “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 “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” button. **Note:** Deleted manuals cannot be recovered.

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 CU Policies manual into the Archived Policies manual. See pages 45 for information on viewing policies in the Archive and restoring policies from the Archive back into the CU Policies 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 Archive Policies Utility, which allows you to archive multiple polices at once.

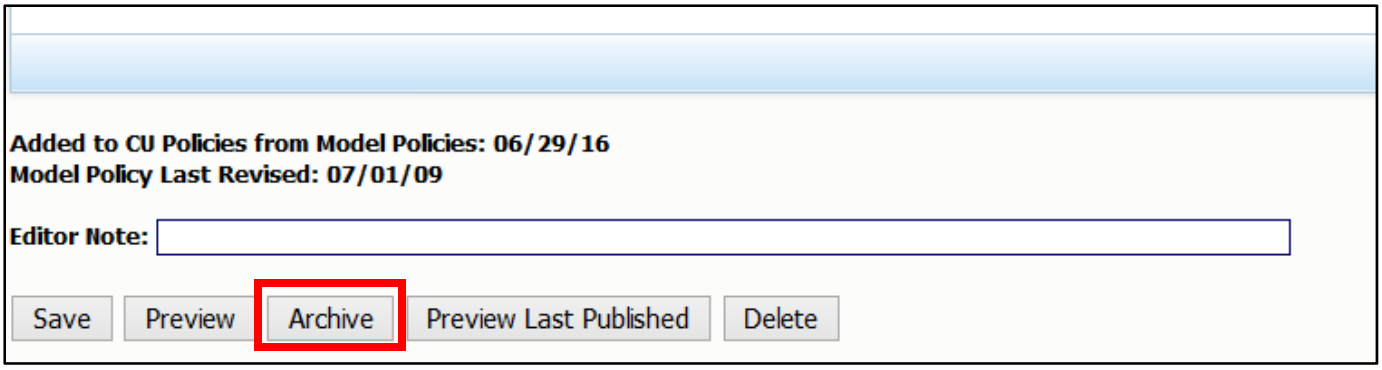
Archive a Single Policy at Individual Policy Level

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 SECTIONS OF CU POLICIES" 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 Archived Policies manual.



Once in the Archived Policies manual, the archived version of the policy can be viewed, printed or restored back to the CU Policies manual.

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

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

Archive Multiple Policies at One Time

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

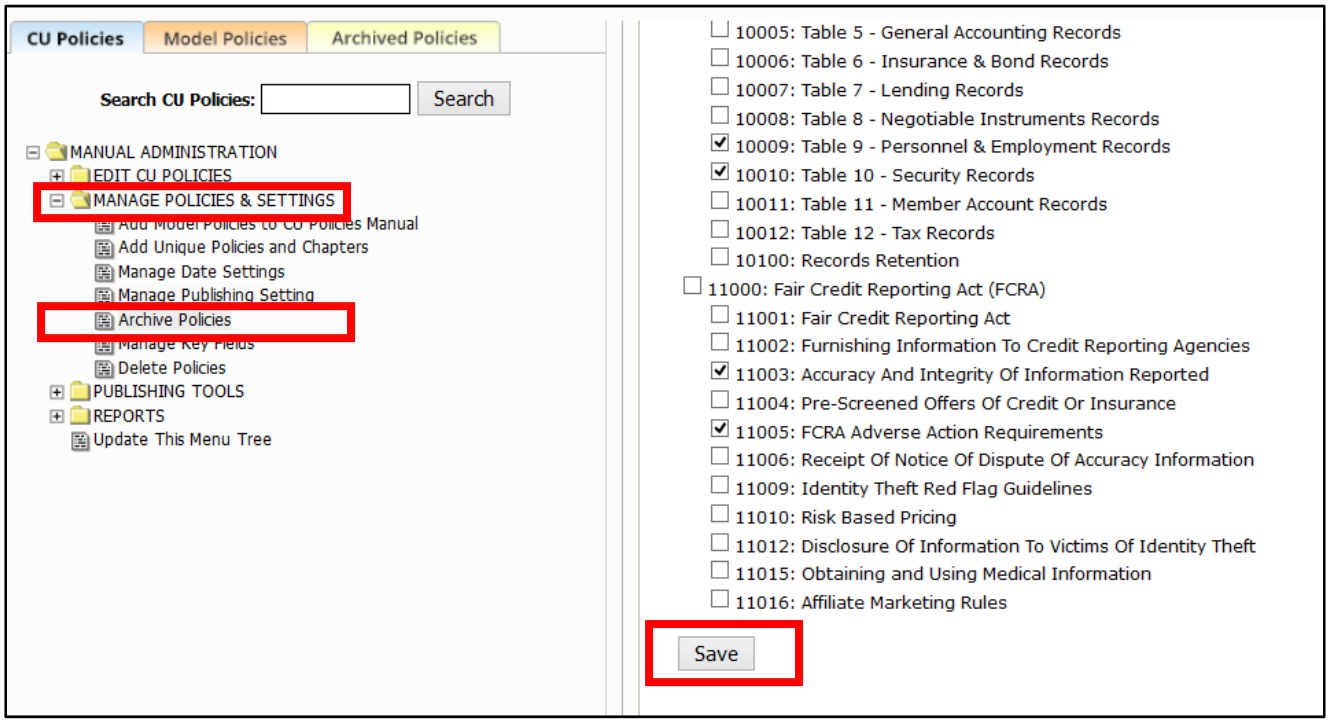
2. Using the plus signs to the left of each folder, expand the “MANUAL ADMINISTRATION” and the “MANAGE POLICIES & SETTINGS” folders.

3. Click on the “Archive Policies” link in the “MANAGE POLICIES & SETTINGS” folder.

4. On the right side of the screen, a full list of all policies in the CU Policies will appear, with a checkbox next to each policy.

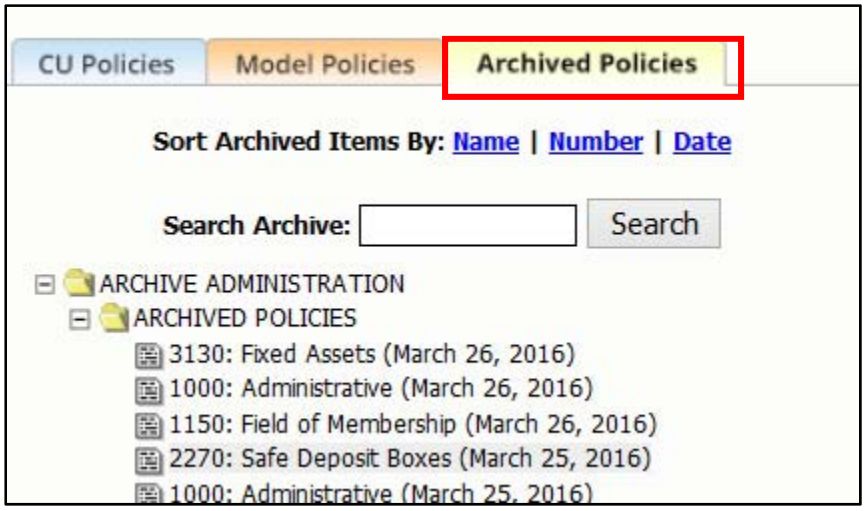
5. Click the checkbox next to each policy you want to archive.

6. Scroll to the end of the page and click the “Save” button.



Accessing the Archive

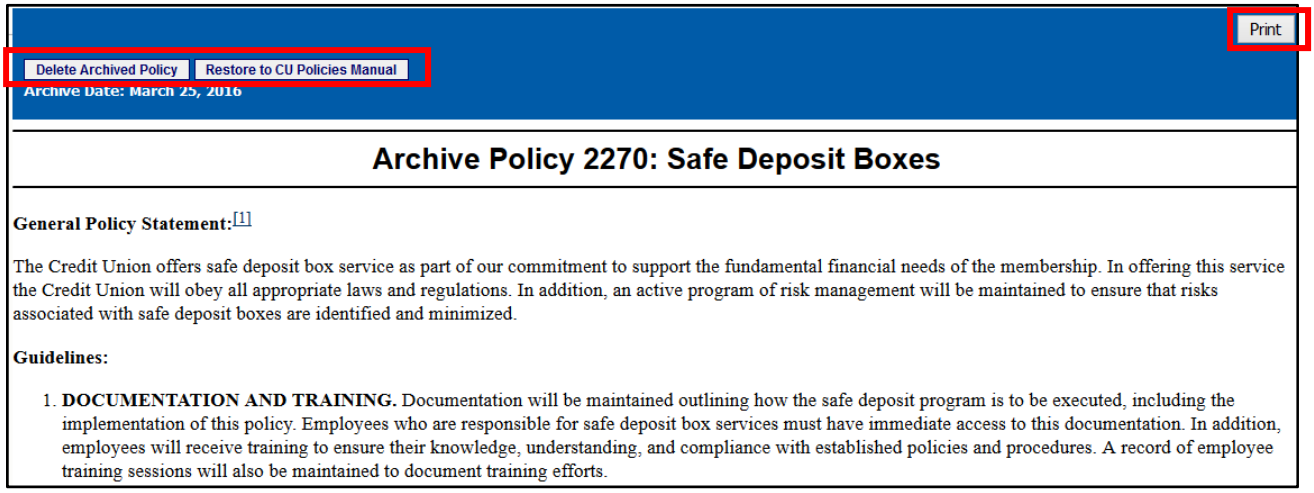
1. Click on the “Archived Policies” tab at the top left of the screen to make sure you are in the Archived Policies manual.



2. Using the plus signs to the left of each folder, expand the “ARCHIVE ADMINISTRATION” and the “ARCHIVED POLICIES” folders. A listing of all archived policies is available underneath the “ARCHIVED POLICIES” folder. Archived policies are in descending date order.

3. Click on any of the archived policies and the full text of that archived policy will appear on the right hand side of the screen.

4. Using the buttons above the content, you can view and print the text, as well as delete the archived policy, or restore this entire policy back into your CU Policies manual.



Un-Archiving a Policy

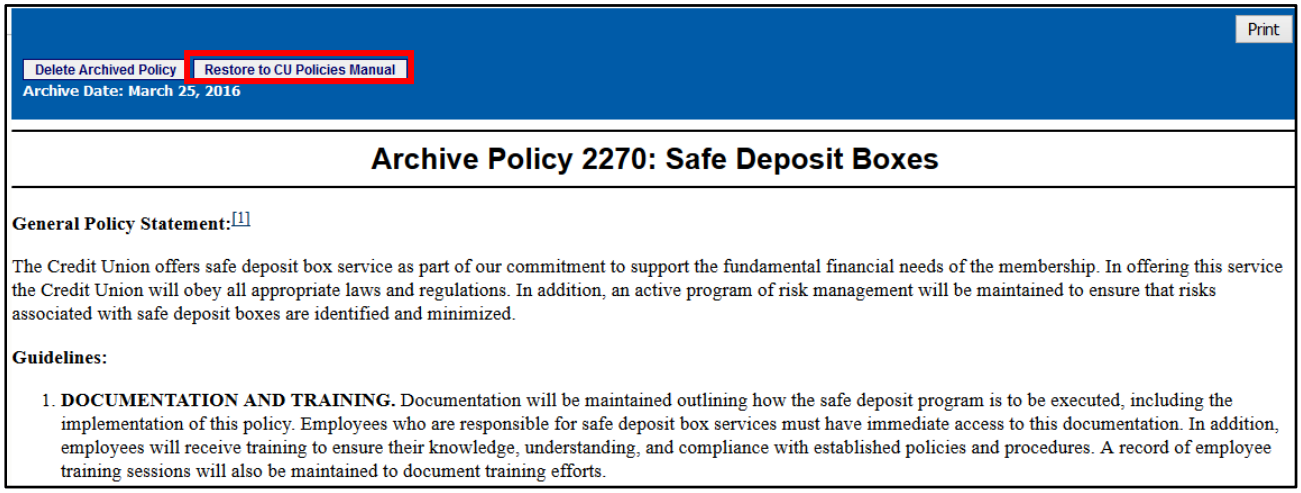
Tip: When un-archiving, be sure to first remove the unwanted policy version from your CU Policies manual (see page 35), then un-archive the proper version of the policy. Un-archiving a policy will not overwrite the policy in the CU Policies manual. If you do not remove the unwanted policy first, you will then have two policies (the correct and the incorrect) in your CU Policies manual.

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

2. Using the plus signs to the left of each folder, expand the "ARCHIVE ADMINISTRATION" and the "ARCHIVED POLICIES" folders. A listing of all archived policies is available underneath the "ARCHIVED POLICIES" folder.

3. Click on the policy you wish to un-archive.

4. Click the "Restore to CU Policies Manual" button, and the policy is now added back to your CU Policies 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 Delete Archived Policies Utility, which allows you to delete multiple archived policies at one time.

Deleting a Single Archived Policy at the Archived Policy Level

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

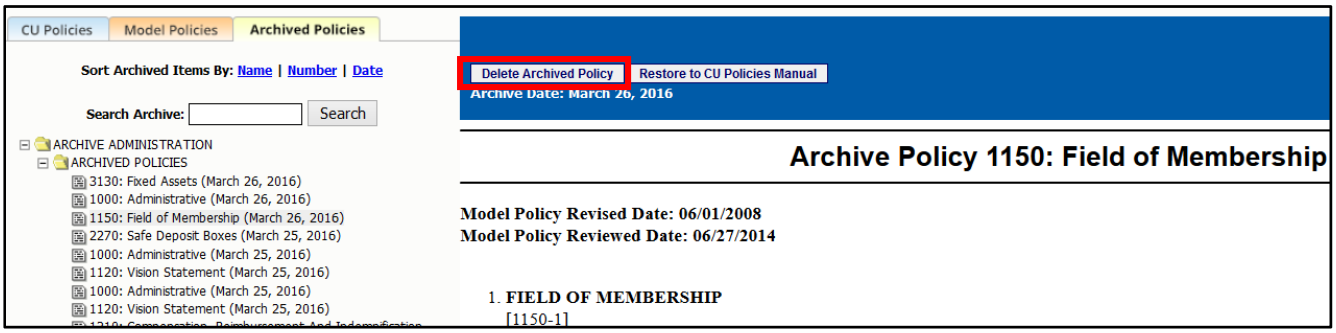
2. Using the plus signs to the left of each folder, expand the “ARCHIVE ADMINISTRATION” and the “ARCHIVED POLICIES” folders. A listing of all archived policies is available underneath the “ARCHIVED POLICIES” folder.

3. Click on the archived policy that you want to delete.

4. The archived text will appear on the right side of the screen.

5. Click the “Delete Archived Section” button above the content.

6. A confirmation box will pop up asking you to confirm the deletion. Click OK.



Deleting Multiple Archived Policies at one Time

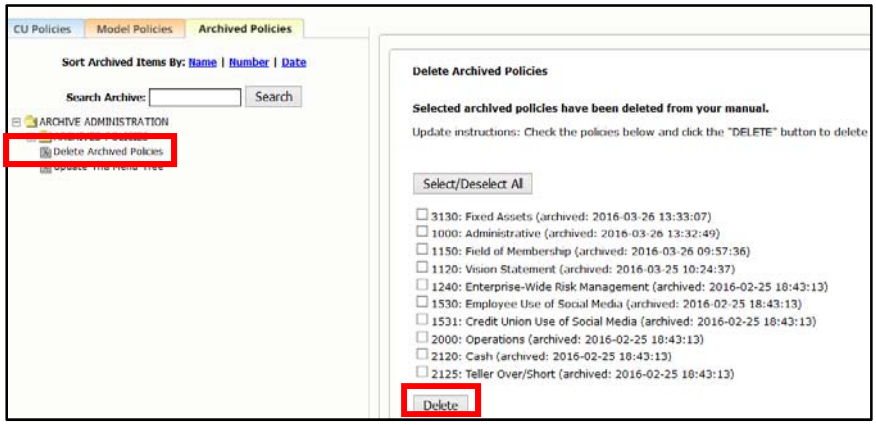
1. Click on the “Multi-Delete Archived Sections” link in the navigation. This is found under the listing of the archived sections (if your archive is very full, you may need to scroll to see this link).

2. This will bring up a list of all policies currently in the Archive, with a checkbox next to each.

3. Check the checkbox next to each archived policy that should be deleted.

4. Click the “Delete” button.

5. A confirmation box will pop up asking you to confirm the deletion. Click OK.

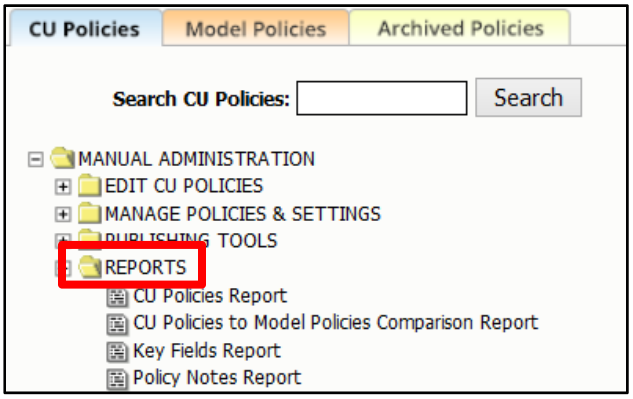


Reports

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 “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 “REPORTS” folders.
3. Click on report you want to review.
4. The report information will appear on the right side of the screen.



Report Features

1. A quick summary of what is included in each report is available in the following section of the User’s Guide.
2. All reports can be viewed on screen or printed.
3. Column headings in any report that show as a link can be clicked to resort the report by that column.

CU Policies Report

- The CU Policies Report will show key dates for all of the policies in the CU Policies, including the "Last Saved", "Revised", "Reviewed", "Approved", "Added to Working from Master" "Model Revised" and "Last Published" dates.

- **Last Saved** 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 CU Policies, which indicates that no customization has been done.

- **Revised/Reviewed/Approved** are date fields 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 CU Policies from Model** is the date the model policy was copied from the Model Policies manual into the CU Policies manual. The "Added to CU Policies from Model" date is often reviewed in conjunction with the "Model Revised Date" (see below). If this date = NONE, it indicates that it was added as a unique policy and was not moved to the Working from the Master.

- **Model Revised Date**. This indicates the date of the last revision to the model policy content in the Model Policies manual. If this date = NONE, it indicates that there is no Model Policies version for this policy number. The "Model Revised Date" can be used in conjunction with the "Last Saved" and "Added to CU Policies from Model" dates to help determine if all updates are included in the policy.

  Note: If an organization creates a unique policy with the same policy number as a Model Policies policy, the "Model Revised Date" will still appear as it is based on the policy number, and not the title or the content of the policy.

Working Policy to MASTER Policy Comparison Report

- This report compares the content in all CU Policies manual to the content in the Model Policies manual. This is based on policy number – if the policy number exists in the CU Policies manual, the report will compare it to the policy in the Model Policies with the same number.

- 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 organization, updates to the Model Policies that have not been incorporated into the CU Policies, or a combination of both.

- **Note:** If an organization creates a unique policy with the same policy number as a Model Policies policy, the report will compare it with the Model Policies model policy as it is based on the policy number, and not the title or the content of the policy.

- **Comparison Results** will compare the title of the CU Policies policy to the title of the model policy in the Model Policies, 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.

Working Policy to MASTER Policy Comparison Report (continued)

- **Exists in Model Policies** indicates if the policy number exists and has been assigned to a model policy in the Model Policies manual. If a unique policy has been added and assigned the same number as a Model policy, this field will indicate that the policy exists in the Model Policies manual, even if the policies contain different content.

- **Last Saved** is a date stamp from the last time someone clicked "Save" while in the policy (in the CU Policies manual). If this date = NONE, then the policy has never been saved since being added to the CU Policies manual, which indicates that no customization has been done.

- **Model Revised Date**. This indicates the date of the last revision to the model policy content in the Model Policies manual. If this date = NONE, it indicates that there is no Model policy version for this policy number. The "Model Revised Date" can be used in conjunction to the "Last Saved" and "Added to CU Policies from Model" dates to help determine if all updates are included in the policy.

- **Added to CU Policies from Model** is the date the model policy was copied from the Model Policies manual into the CU Policies manual. "Added to CU Policies from Model" date is often reviewed in conjunction with the "Model Revised Date". If this date = NONE, it indicates that it was added as a unique policy and was not moved to the CU Policies manual from the Master manual.

Key Fields Report

- The "Key Fields Report" is a quick view of all the Key Fields in the system and how each has been defined.

- Key Fields that are not defined will show as the key field code (example [7150-1]) in the Current Value column.

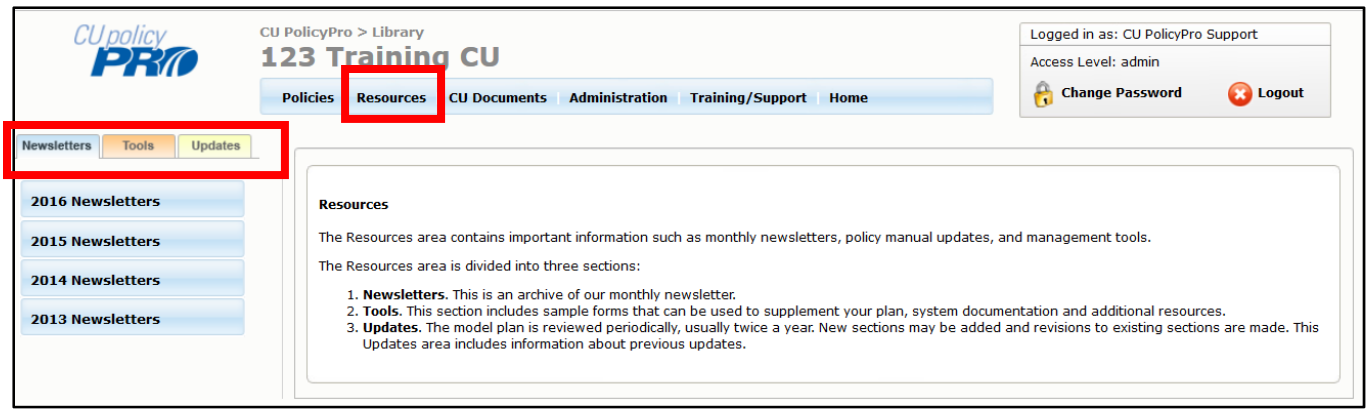
Policy Notes Report

- The Policy Notes Report will show all editor notes for all policies in the CU Policies.

Resources

Click on “Resources” in the top navigation to access CU PolicyPro **Resources**. This is a “read only” area where you can find archived newsletters, tools, and information on content updates.

Click on the tabs on the left side of the screen to view each area of the Resources.



The Resources area is divided into three sections:

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

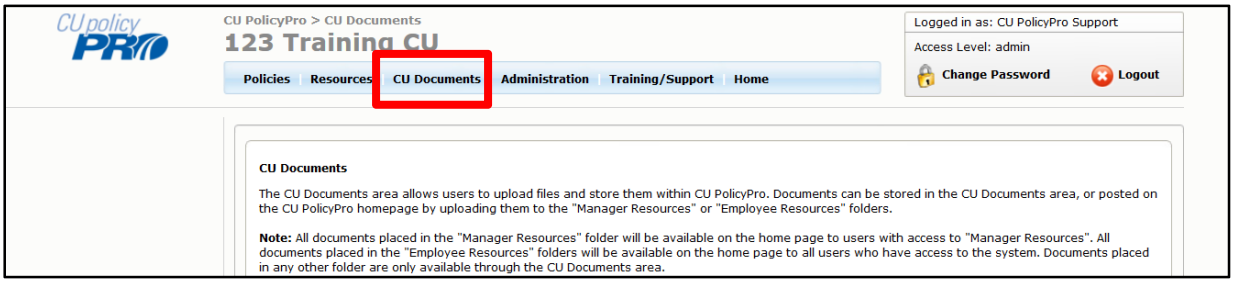
2. **Tools.** The Tools section includes sample forms, system documentation, some additonal general resources.

3. **Updates.** CU PolicyPro is updated quarterly. 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.

To access any of the items in the Resources area, simply click on the tab you wish you access (Newsletters, Tools or Updates) and a new left navigation menu will appear. Click on the navigation buttons, then click on the content item you wish to view. **Note:** Some of the content items also have sub-category buttons. When you click on the link to a document, it will open in a new window.

CU Documents

Click on “CU Documents” in the top navigation to access the CU Documents area.

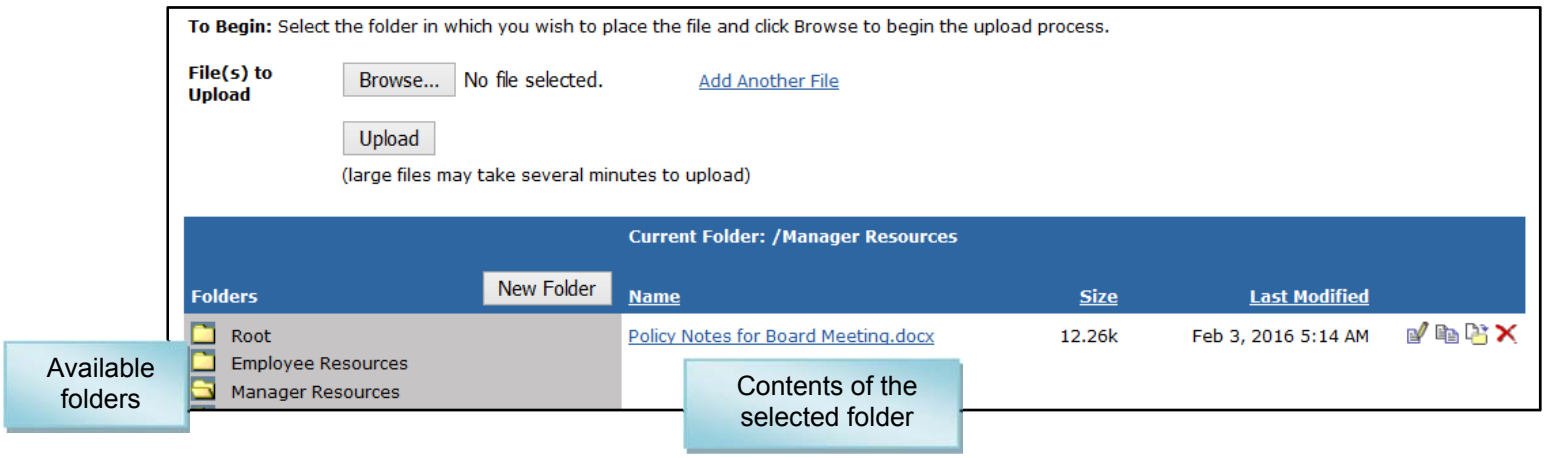


The CU Documents area allows you to upload and store documents. Once in CU Documents, documents can be posted to the Home Page, either in the “CU Documents - Manager Access” or “CU Documents - Employee Access” folder.

CU Documents File Structure

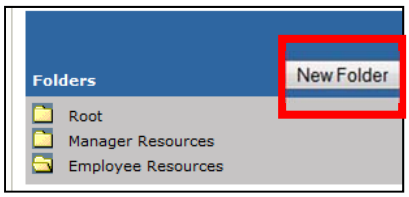
1. By default, the CU Documents area contains three folders: “Root”, “Employee Resources”, and “Manager Resources”.

2. Click 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 Folder” button next to the Folders listing. You can create subfolders to existing folders. **Note:** Subfolders and their contents are available from the CU Documents 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 CU Documents

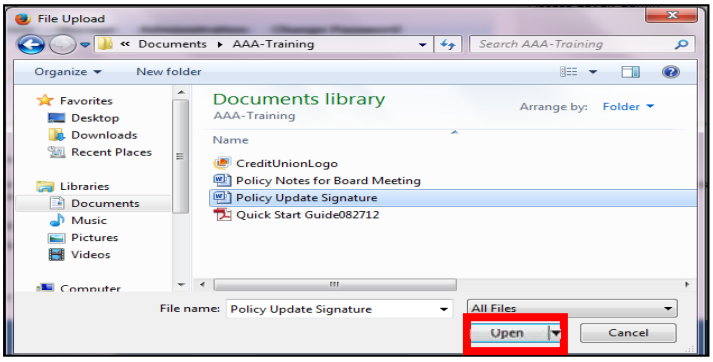
1. Click the folder to which you wish to upload your document.

2. To upload a document, click the “Browse” button next to the File Upload field. **Note:** Depending on the internet browser you are using, the “Browse” button may be named something other than “Browse.” This will allow you to browse your computer hard drive or network to choose a file. **Note:** To upload multiple documents, click the “Add Another File” link. You can add as many upload fields as you need.

“Browse” to choose your file. This screen shot shows two available file upload fields.

Click “Add Another File” to open an additional upload field. Click the minus sign to remove additional upload fields.

3. Once you’ve found the file, to upload, click on the file name, then click the “Open” button on the dialogue box. **Note:** Again, depending on your browser, your screen may appear slightly different than the screen shot below.



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

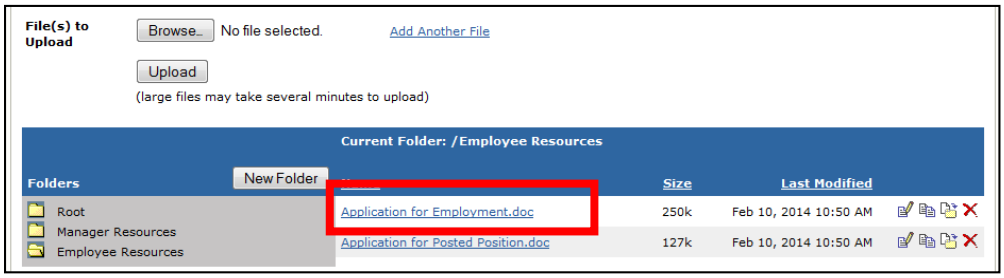
The name of the selected file shows next to the Browse button in the Upload File Field.

Note: The CU Documents 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.

Note: File size is limited to 2MB. Files over this size cannot be uploaded.

Opening Files in CU Documents

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



Making Changes to Files in CU Documents

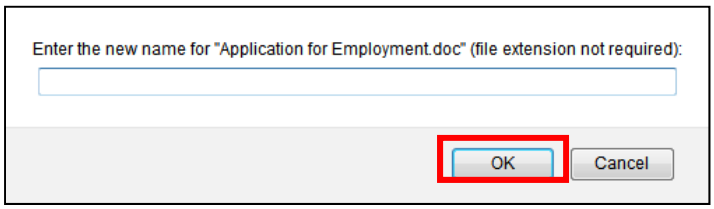
1. If any changes are made to the file after it is uploaded, the file must first be saved locally, then the updated document re-uploaded to CU Documents area. It is recommended that you remove the old file before uploading the updated file.

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

Renaming Files in CU Documents

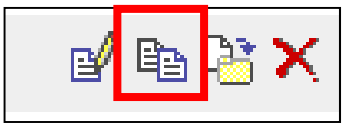
1. To rename a file, click on the “rename” icon to the far right of the file name.

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



Copying Files in CU Documents

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

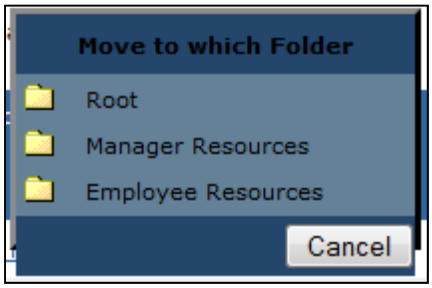


2. This will create a copy of the file, named “Copy of (file name)”. You can then rename or move this file, if desired.

Moving Files between Folders in CU Documents

1. To move a document to a different folder in the the CU Documents 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.



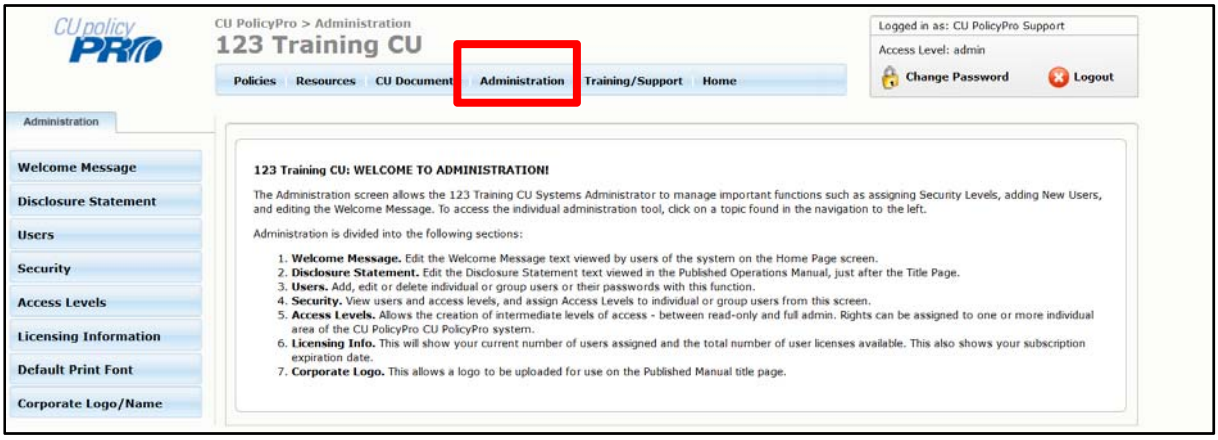
Deleting files in CU Documents

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

2. This will permanently delete the document from the CU Documents 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

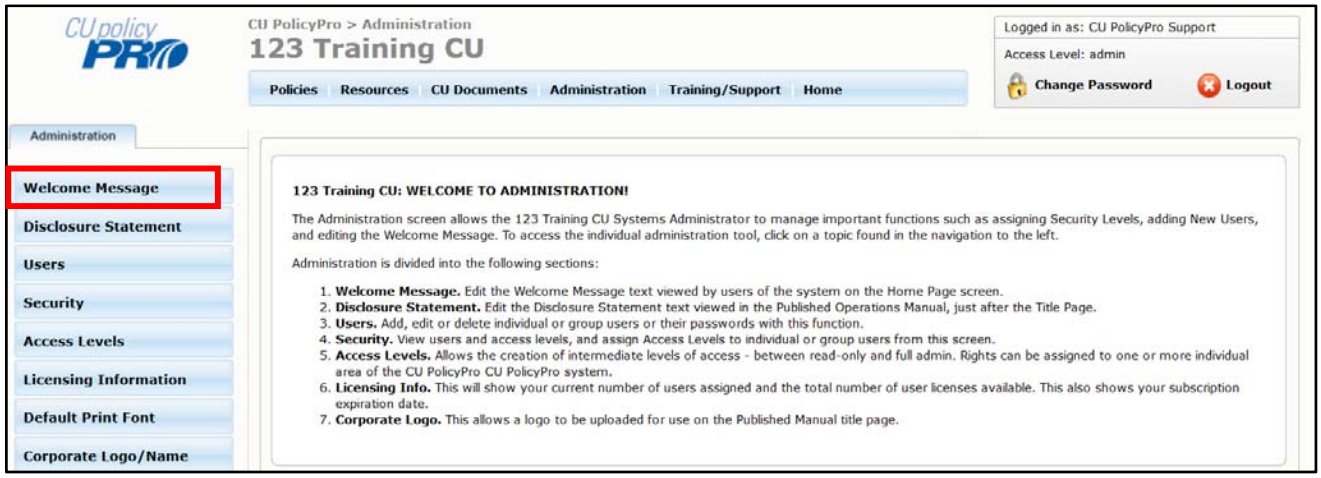
Click on “Administration” in the top navigation.



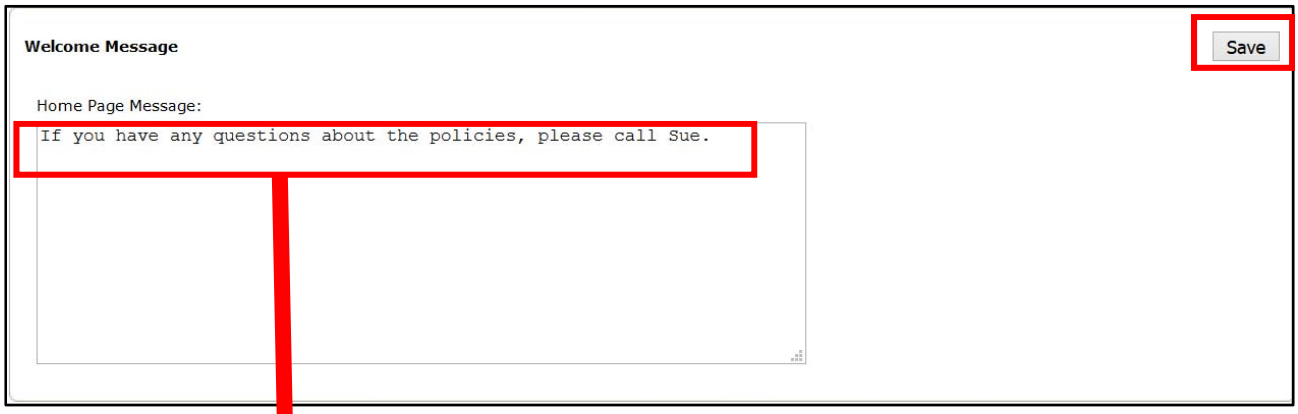
The Administration Area allows you to manage several functions, including the managing users, adding a Welcome Message to the Home Page, adding a disclosure to your published manual, setting your default print font, uploading your logo, and viewing your license and subscription information.

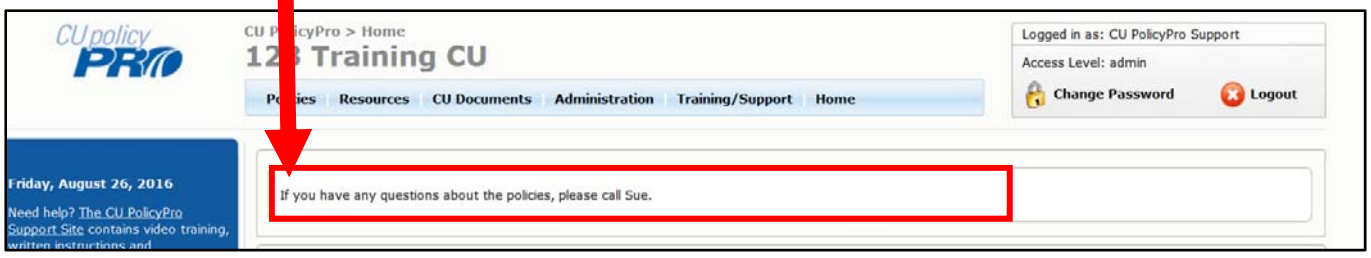
Administration: Adding a Welcome Message to the Home Page

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.





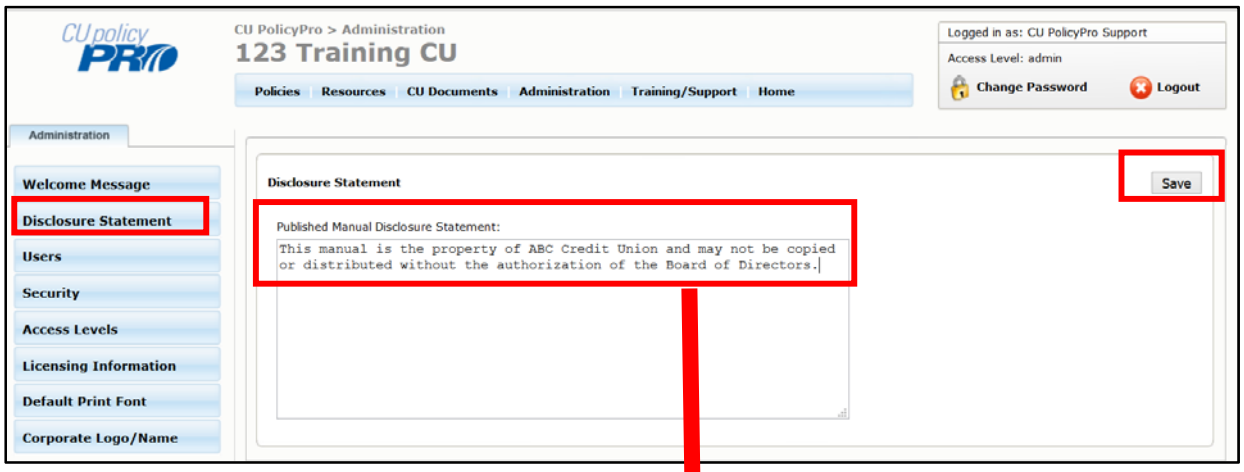
Administration: Adding a Disclosure to the Published Manual

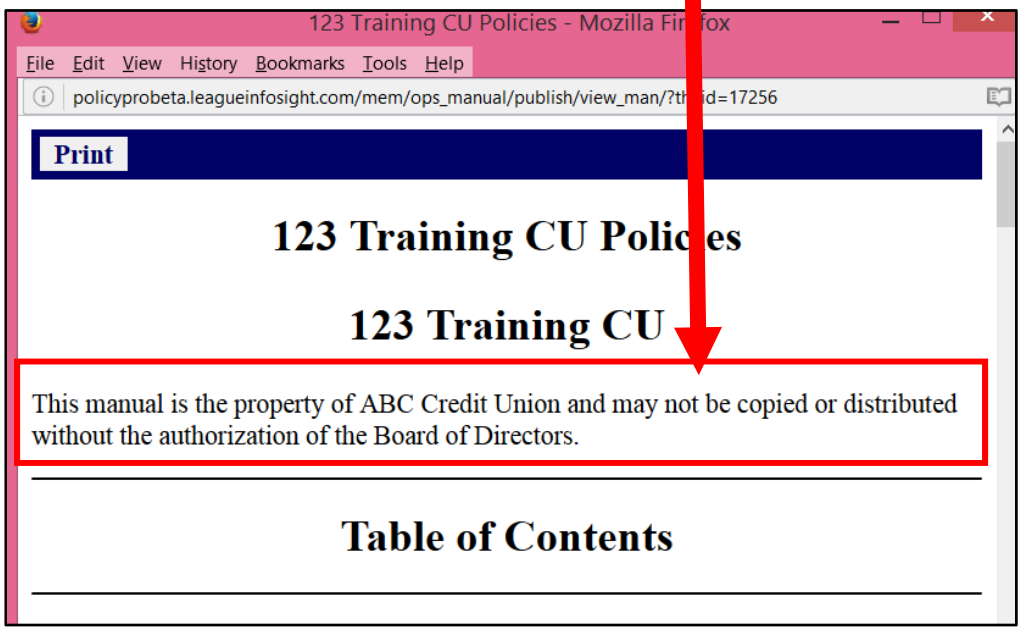
1. Click on the “Disclosure Statement” button on the left navigation.

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

3. This message will now appear in the Published Manual, on a separate page between the Title Page and the Table of Contents.

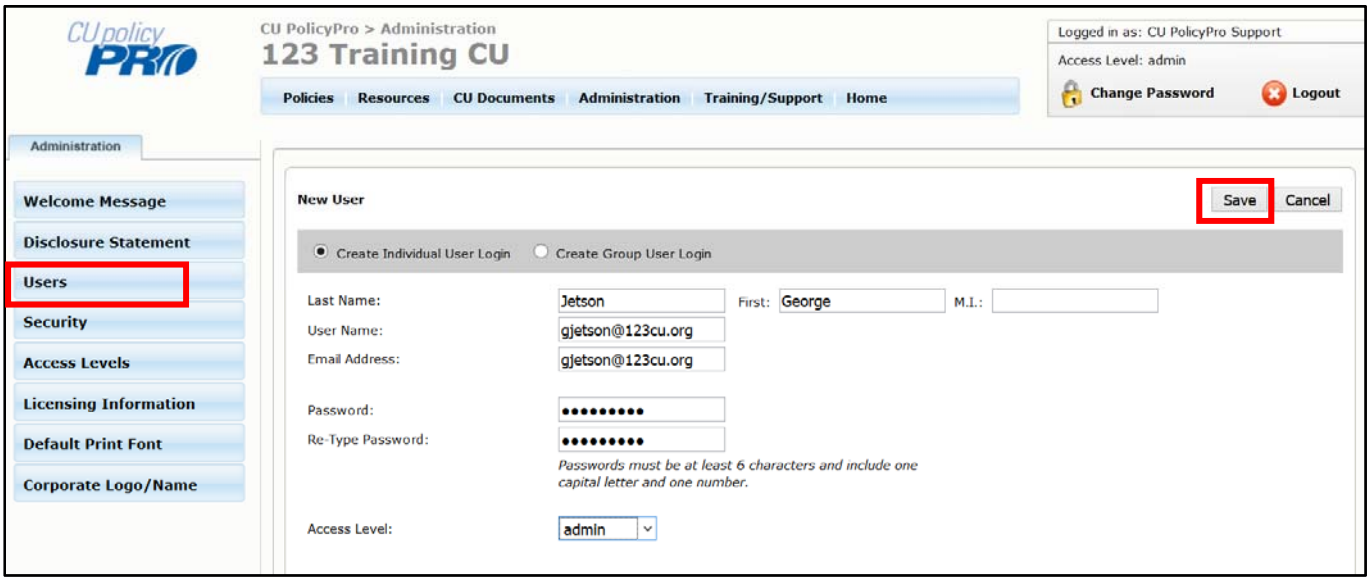
Note: Some organizations choose to use the “Additional text on Title Page” field to keep disclosure information on the Title Page. See page 37 for more information on publishing options and the “Additional text on Title Page” field.





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 (see below).



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

   An 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). **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.**

5. For an Individual, type in the First and Last Name, the User Name, Email address, and Password. (Passwords are encrypted and must be entered in twice for security reasons). Group Users will have a Group Name (instead of First/Last) and will not have an option for email address.

6. From the dropdown list, choose the Access Level for this user. See page 62 for more information on access levels.

7. When you’re finished, click the “Save” button.

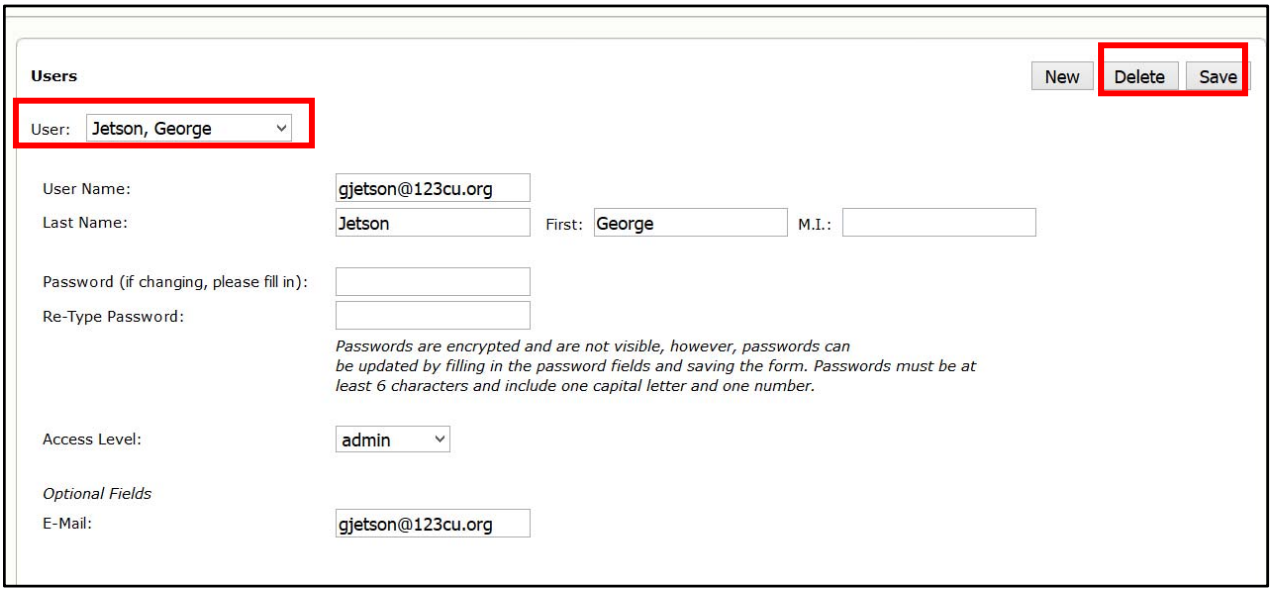
Administration: Editing or Deleting Users

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. After 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

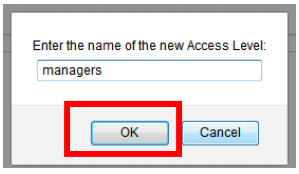
By default, there are only two access levels: Admin and Employee.

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. 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 Change Password) will be available to an Employee level user.

You may find it useful to have access levels between Admin and Employee. Follow the steps below to create and define custom levels of access.

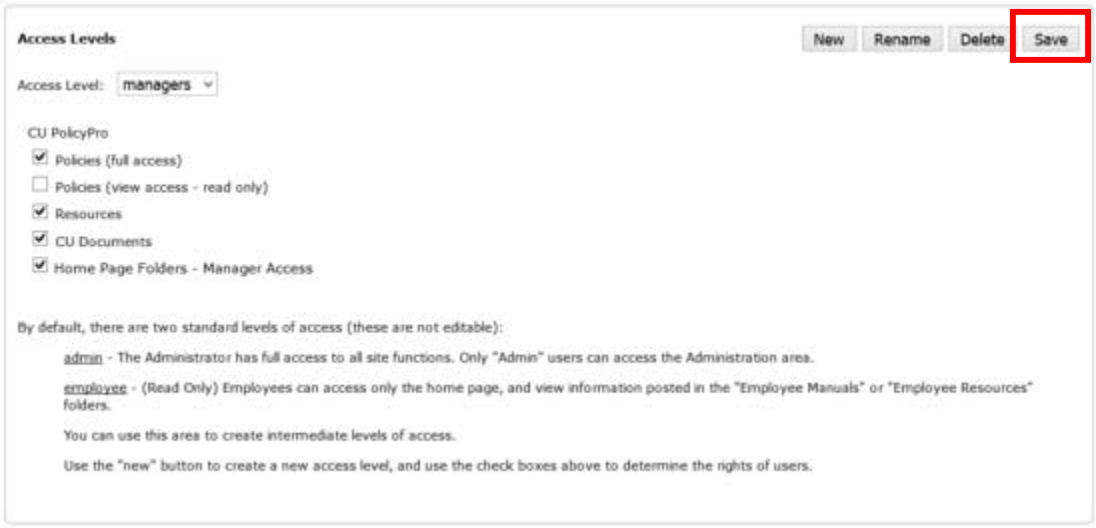
1. Click on the “Access Levels” button on the left navigation.

2. Click “New” to create a new access level. You will be asked to name the access level. Name the access level then click “OK”.



Administration: Creating Additional User Access Levels (continued)

3. A blank “Access Levels” form will appear. Use the checkboxes to determine what areas this access level can access.



- **Policies (full access)** - allows this user to access the Policies area, and the user will have full rights to edit the CU Policies, including publishing, archiving, etc. If this option is selected, the system will not allow the “Policies (view access – read only)” option to be slected as well.

- **Policies (view access – read only)** - allows this user to access the Policies to see the CU Policies, Model Policies, and Archived Policies area. The user can view and print the policies from this manual, but they cannot edit, add, delete or publish policies in the CU Policies Manual, they cannot archive or un-archive policies, or move policies from the Model Policies to the CU Policies Manual. This is read only access. If this option is selected, the system will not allow the “Policies (full access)” option to be slected as well.

- **Resources** - allows the user to access the resources found in the Resources area.

- **CU Documents** - allows the user full access to the CU Documents area, including uploading files and posting them to the “CU Documents- Manager Access” and “CU Documents- Employee Access” folders

- **Home Page Folders - Manager Access -** allows this user to see the documents posted in the “Published Policies - Manager Access” and “CU Documents - Manager Access” folders on the home page.

  Note: If all options are checked, this user can do everything except go into the ADMINISTRATION area.

4. Once your options are selected for this user level, click “Save”.

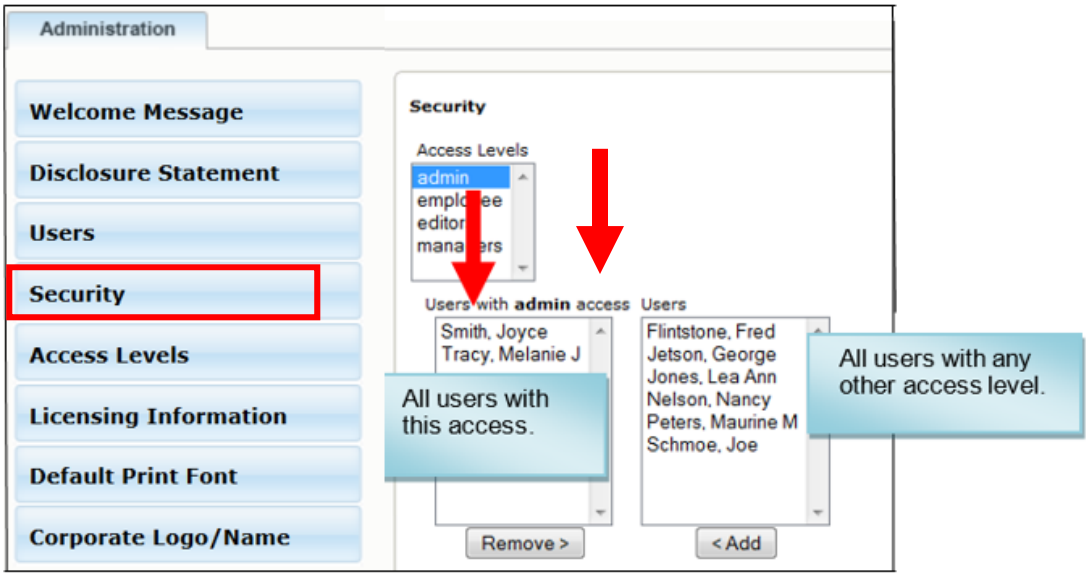
5. You can also delete or rename existing access levels, using the buttons on the far right of the screen.

Administration: Viewing/Editing Multiple Users at Once

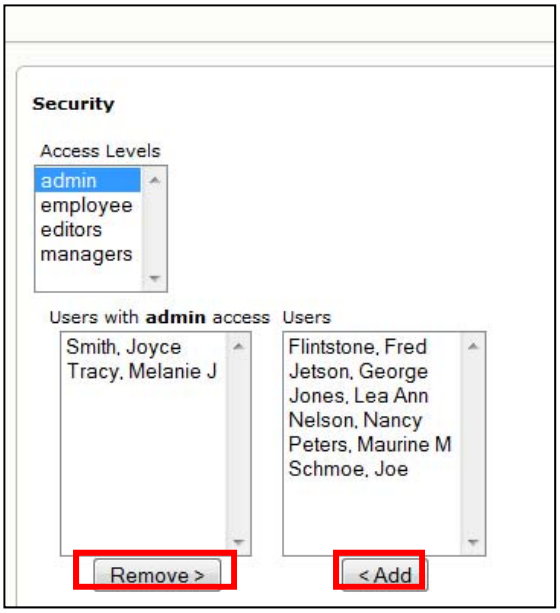
1. Use the “Security” tab to quickly view all user levels and user IDs, and to quickly change the user access level for multiple users at one time.

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

3. Clicking on the various access levels will show all users with that level of access in the left side box. 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 Information

1. To view your license information, click on the “Licensing Information ” 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 organization receives 50 user licenses. If you need additional users, contact policysupport@cusolutionsgroup.com.

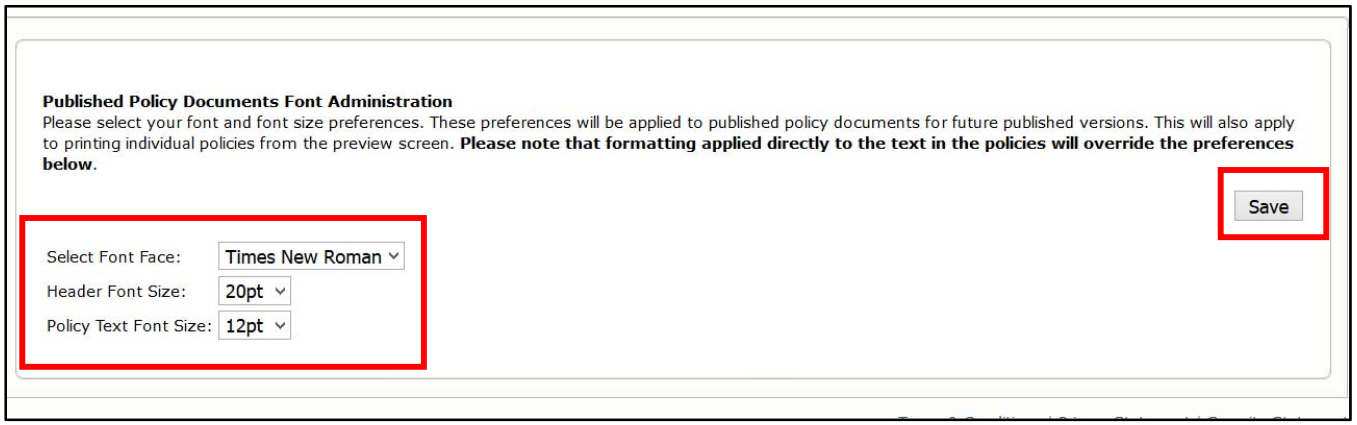
Administration: Default Print Font

The Default Font for published manuals and policies in Preview Mode is Times New Roman, with the header text of 20 point and policy text of 12 point. You can adjust the defaults for your own published manual using the settings found in this area.

Notes: 1. The fonts styles selected will only apply to published manuals going forward. Any previously published manual will not adopt these font styles. 2. If you set a new default font for the published manual, that style will stay set until it is changed. 3. Any formatting applied directly to the text in a policy in the CU Policies Manual will override the default print font.

1. Select the font face, header size and policy text size.

2. Click the “Save” button.



Administration: Updating Corporate Logo and Organization Name

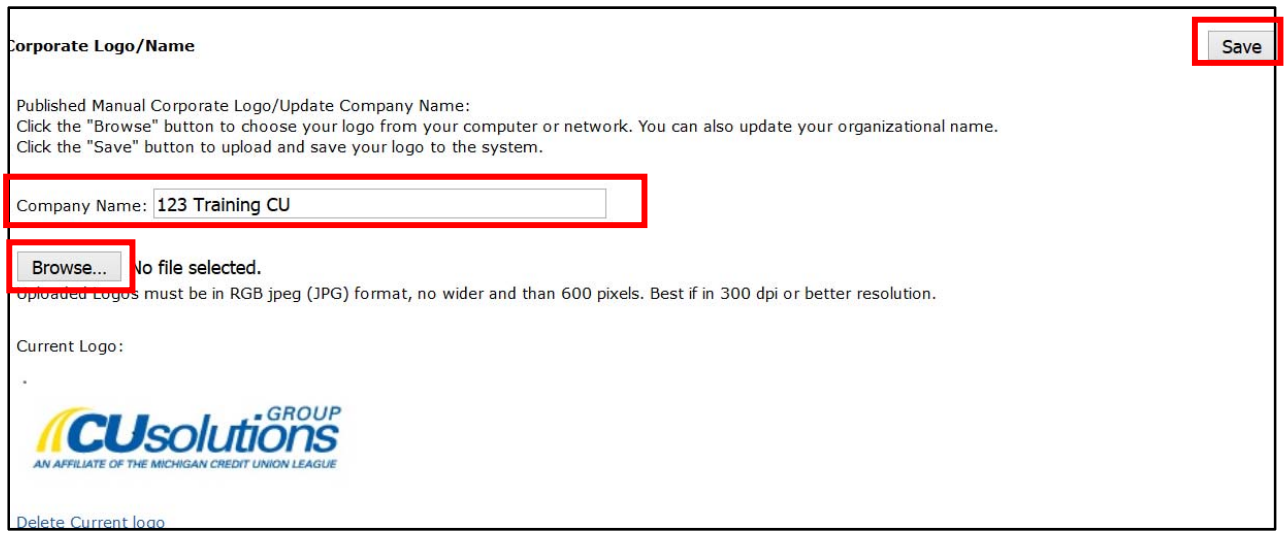
3. A logo can be uploaded in the Administration area to be used on the title page of any published manual.

4. Click on the “Corporate Logo/Name” button on the left navigation.

5. The company name can ne updated at any time.

6. Use the “Browse” button to upload your logo. Your current logo will show below the “Browse” field. **Note:** Depending on the internet browser you are using, this button may be titled something other than “Browse.”

7. 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

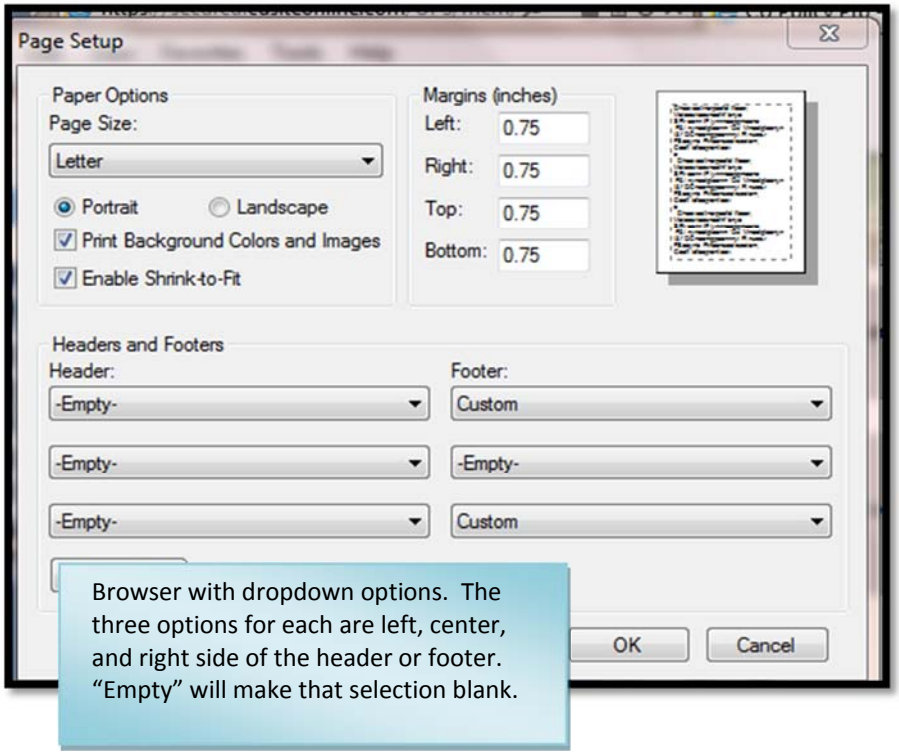
Because this is an HTML document printing from a Web site, your Internet Page Set Up options will apply when you print the manual. Many Internet Page Set Up options call for the URL to print on the header and/or the footer of the page, which can make the page look cluttered and unprofessional.

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

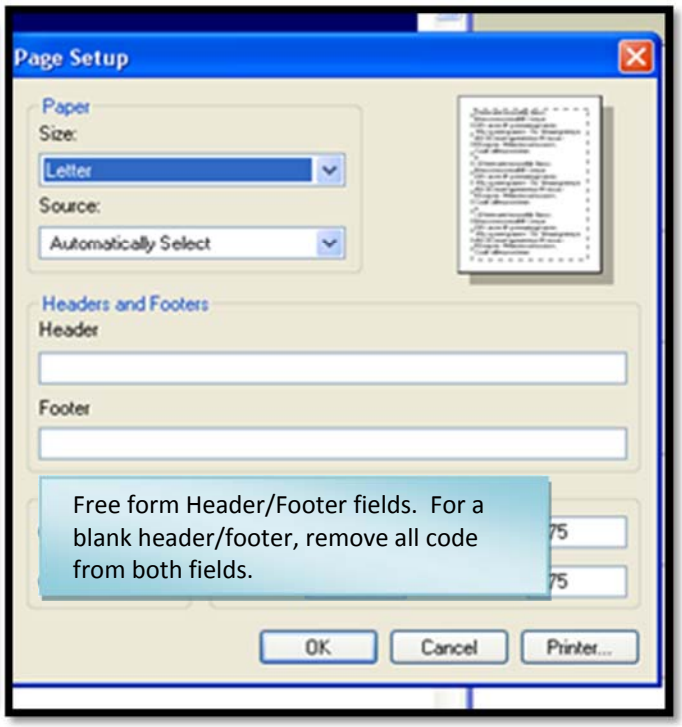
A pop up box will open with the Page Set Up options. The Page Set up options pop up may look different depending on your Internet Browser version. Two examples are below.

The Header and Footer options allow you to choose what shows in the Header or Footer of your printed documents. Many organizations 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.



Browser with dropdown options. The three options for each are left, center, and right side of the header or footer. "Empty" will make that selection blank.



Free form Header/Footer fields. For a blank header/footer, remove all code from both fields.

If your browser provides dropdown selections, you can choose from the dropdowns to add in page numbers, date, or other options. If your browser only provides 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.

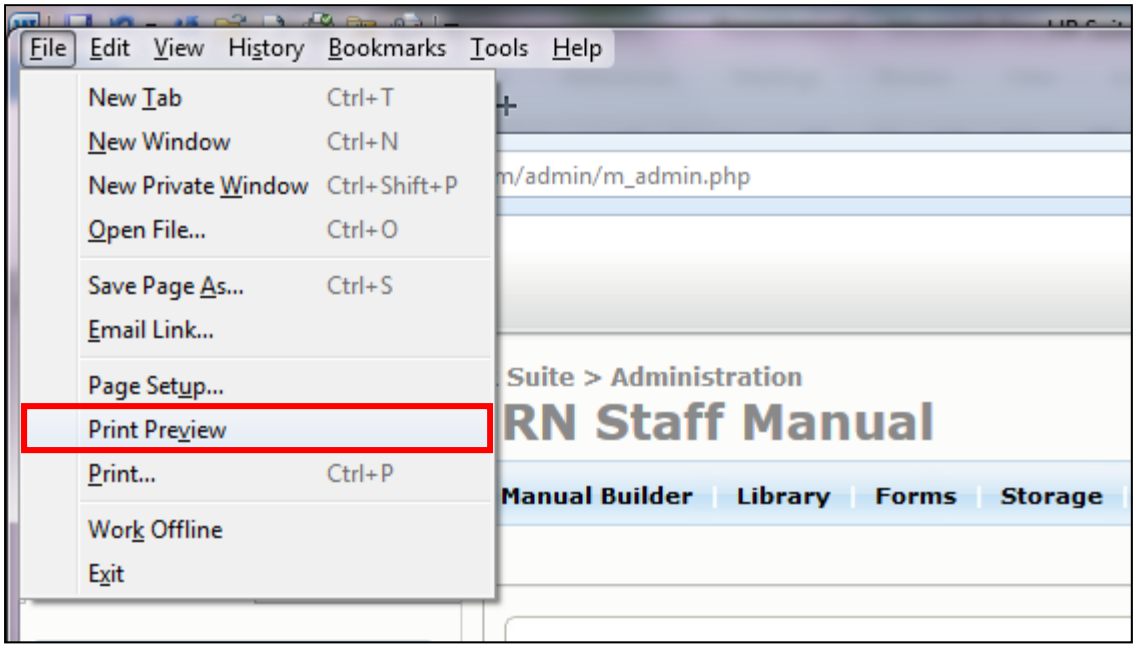
Tip #2: True Print Preview

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 margins, page breaks, paragraph breaks, accurate sizing for tables and columns, and headers and footers will not be shown in preview mode.

To view 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 few minutes to load.



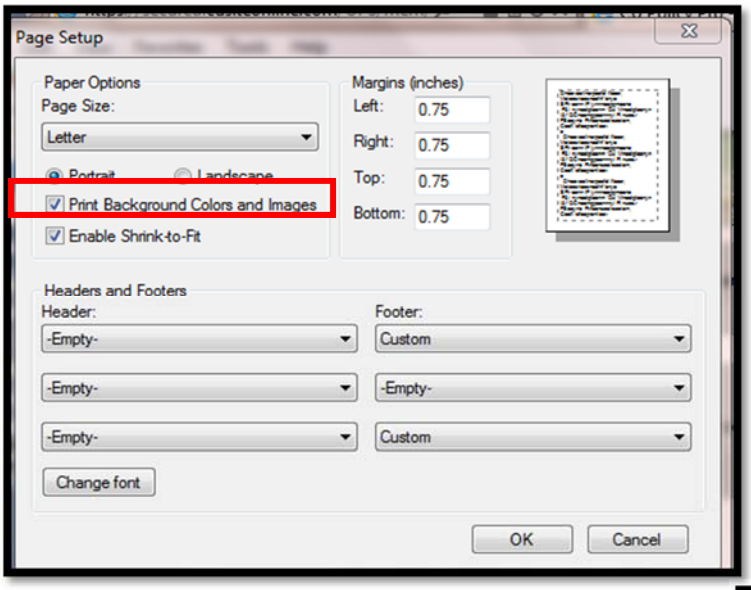
Tip #3: Printing Background Highlighting

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.

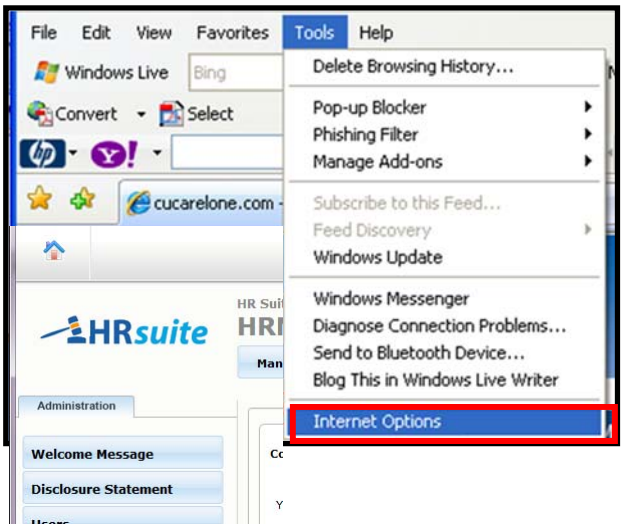
Try this first:

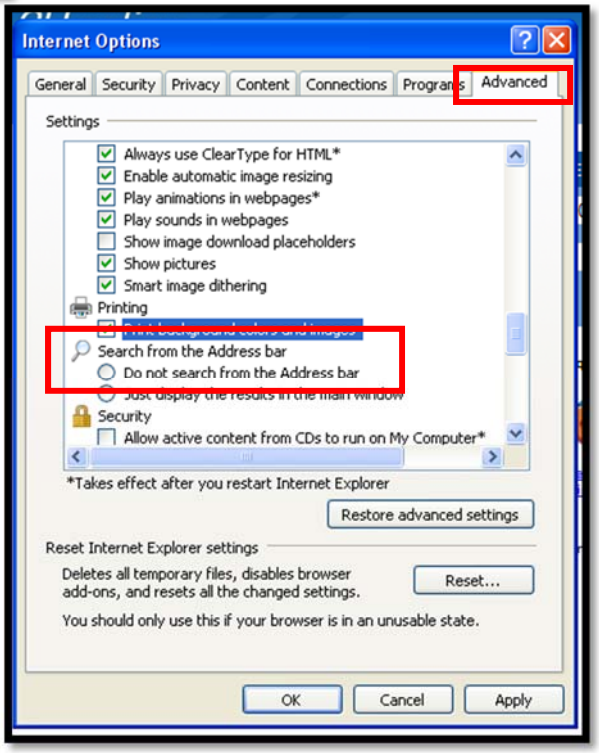
1. **Go to FILE > PAGE SET UP.**
2. **The setting is the "Print Background Colors and Images" setting.**
3. **This must be checked, otherwise background highlighting will not print.**



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