CU PolicyPro

USER'S GUIDE

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Getting Started

Before your Policy Manual can be printed and distributed, important information should be customized. In its original form, the Manual is comprehensive and provides 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 CU PolicyPro to fit your operation.

Editing, deleting or adding to the text of the Manual is a broader and more flexible area of customization. You may easily modify the Manual to meet your needs. Some of our clients simplify the content while others add policies. We hope you will utilize this powerful policy management tool to streamline the administration of your policies and to save you time. An investment today in the initial customization of your Manual will pay big dividends for you in the years ahead.

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.

If you experience technical difficulties, call our toll-free hotline at 800-262-6285, ext 581 or e-mail us at support@cuhrsolutions.com.

> Credit unions in **Pennsylvania** or **Delaware** may contact 800-932-0661, Option #3 or policypro@pcua.coop.
>
> Credit unions in **North Carolina** may contact the Compliance Department at 800.822.8859, or email compliance@ncleague.org.

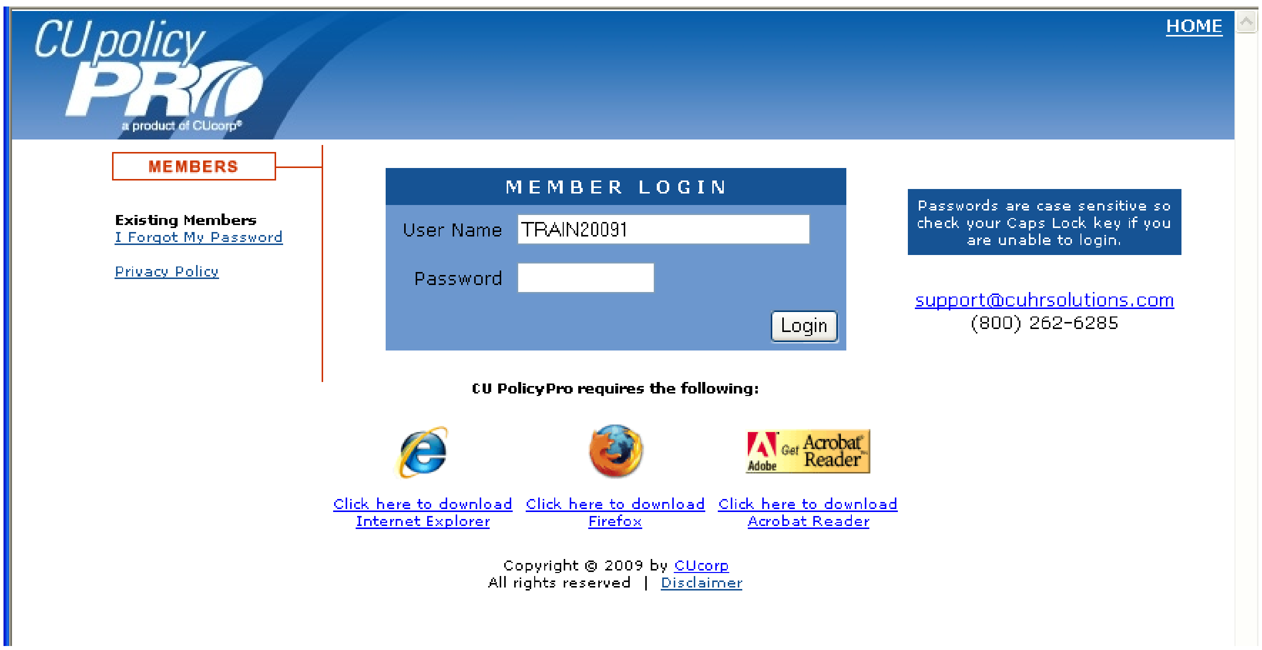
Good Luck!

Getting Started – Logging In

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

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

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



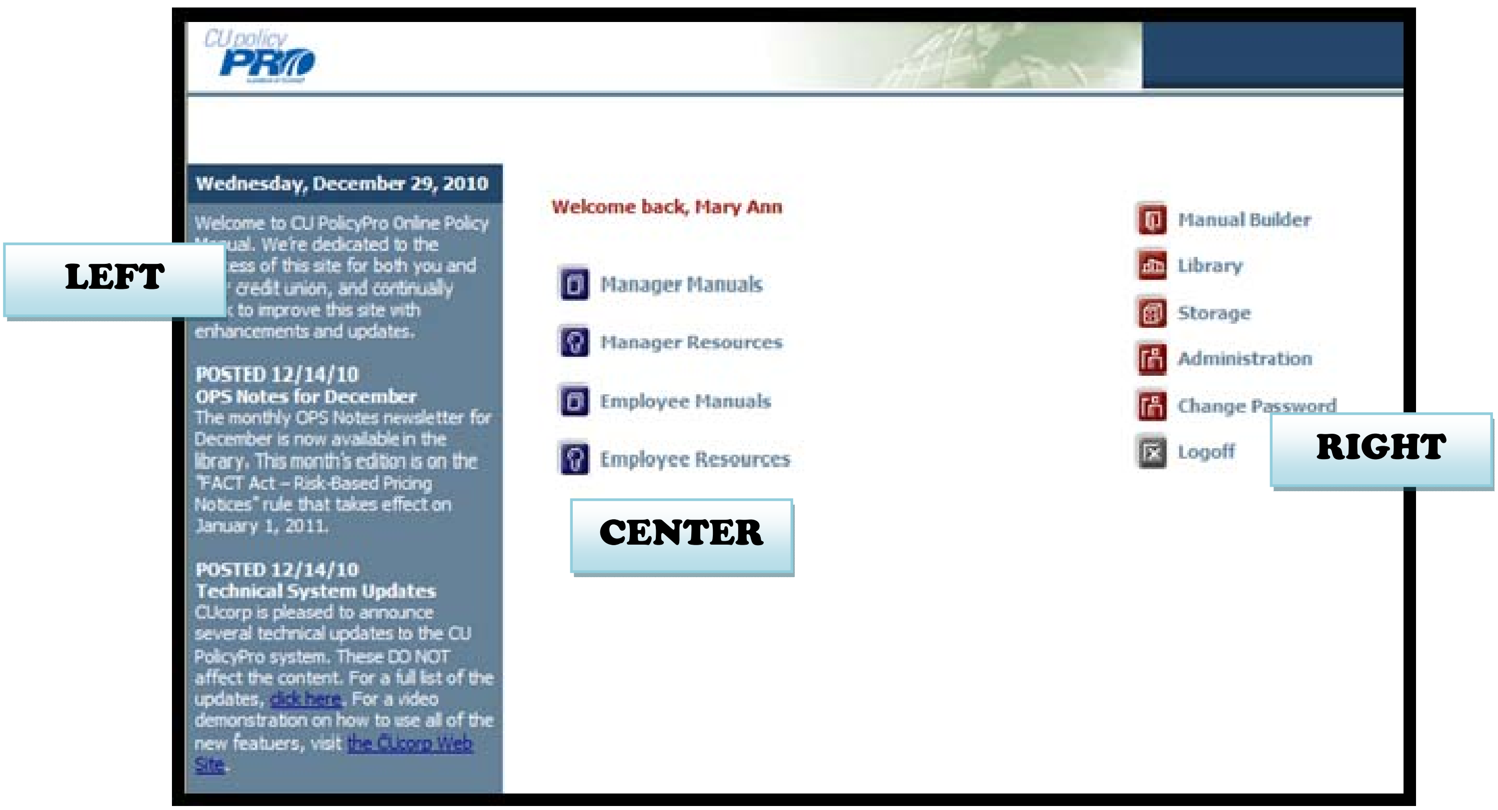
Getting Started – The Home Page

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

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

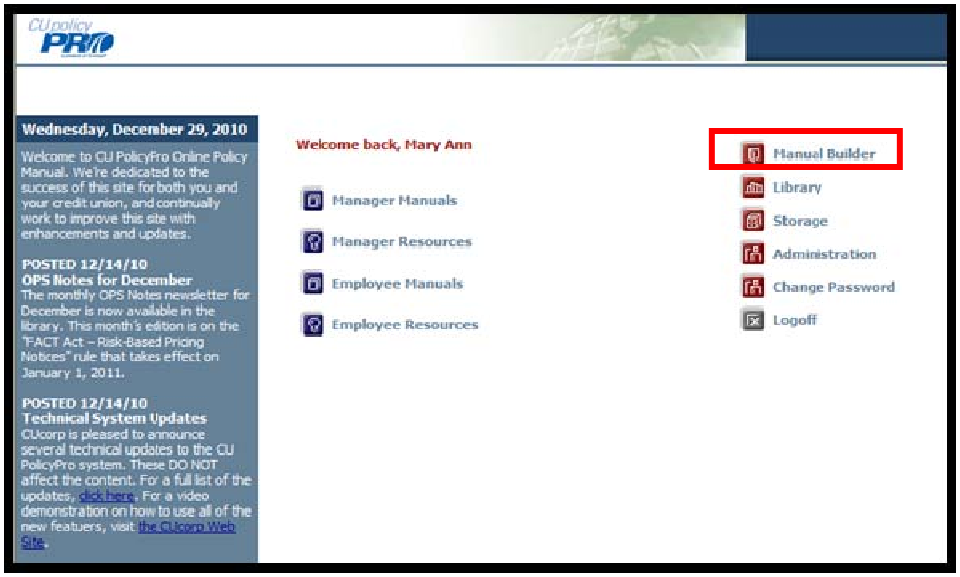
The **center area** of the screen provides a welcome message to the user, and any resources that have been posted by the credit union’s administrator. Access to resources is determined by the user’s login. “Manager Resources” and “Manager Manuals” are available to users with full administrative rights,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

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



Manual Builder – Opening Your Manual

Click on “Manual Builder” in the right hand navigation to access your CU PolicyPro Operations Manual.



Manual Builder – The Working Manual

Opening your manual brings you to the *Working Manual*.

On the left side of the screen is a folder called *Manual Administration*. This folder contains the entire *Working Manual* and all the tools you need to customize your manual.

Directly above the *Manual Administration* folder are three links – **Working**, **Master** and **Archive**. These links allow you to move between your *Working Manual*, the *Master Manual* and any *Archived* sections. The *Master Manual* and *Archive* are discussed on pages 44 and 45.

The right hand side of the screen will display any information related to the folder you are working with. When you first enter the *Manual Administration* area, some resources for Getting Started are available. As you move through the folders contained within *Manual Administration*, the information on the right side will change.

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

You can rename your *Working Manual* by clicking the "Rename" button. By default, the *Working Manual* is titled "Operations Manual".

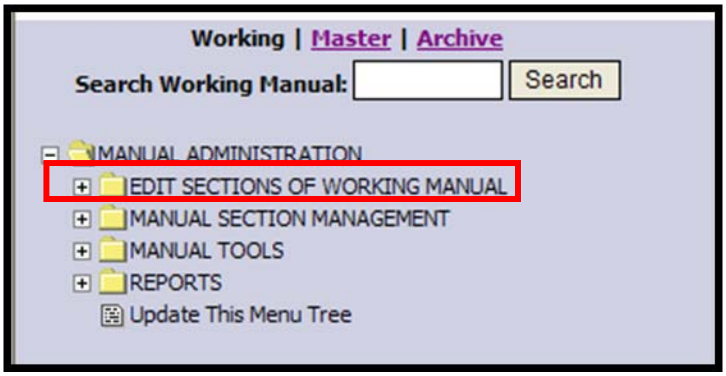
Manual Builder – The Working Manual

Expand the *Manual Administration* folder either by clicking on the name of the folder, or clicking on the plus sign to the left of the folder. Once the folder is expanded, you can contract the folder by either clicking on the name of the folder or the minus sign to the left of the folder.

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

Once the *Manual Administration* folder is expanded, you can see the tools available within it.

The first available section is ***EDIT SECTIONS OF WORKING MANUAL.*** The *Working Manual* is your customized version of CU PolicyPro. When you first get your manual, the *Working Manual* is pre-loaded with the *Master Manual* content. Over time, as you customize your *Working Manual*, it will become the customized manual for your credit union.



As you open each folder, the additional options within that folder expand.

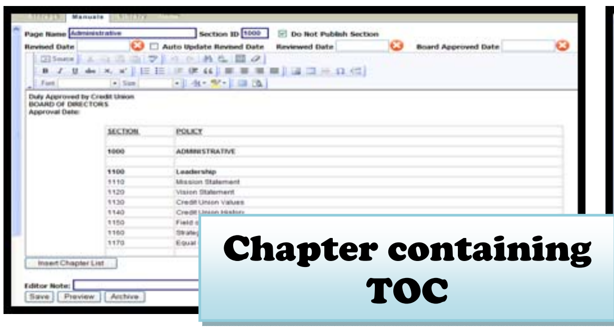
Manual Builder – The Working Manual

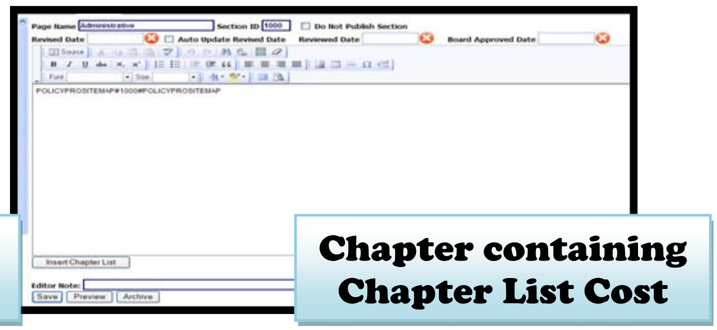
The *Working Manual* is divided into Chapters, represented by folders. Expand each Chapter folder to view the policies found within that Chapter.

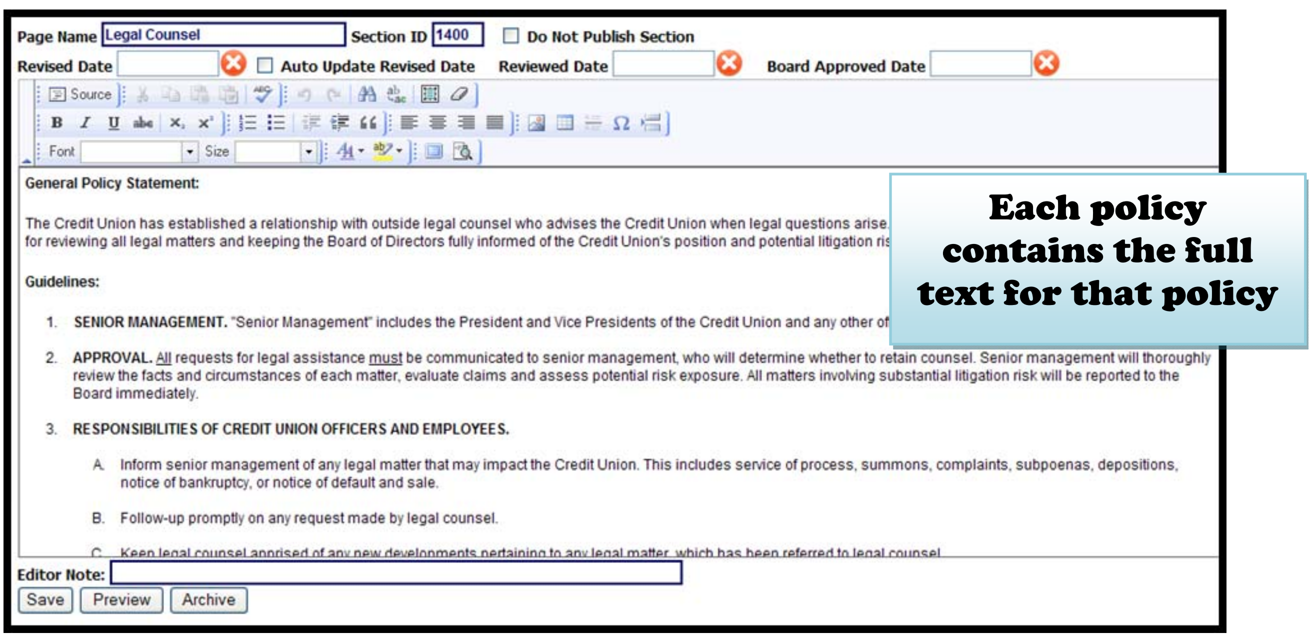
Each Chapter and the policies within each chapter can be thought of an individual document.

When you click on any item within the *Working Manual*, the right side of the screen will show you the content for that item. For the main page of each Chapter, a Table of Contents for that chapter is listed; for each policy, it is the full text of the policy.

Tip: On the main chapter page, for manual created prior to January 2011, the Table of Contents is simply text that may need to be updated as you add or remove sections while customizing your manual. Some credit unions choose to remove the Table of Contents and add an introductory paragraph for that section to avoid the task of updating the TOC, or choose to insert Chapter List Code. For help on inserting a Chapter Code List, contact support@cuhrsolutions.com.







Manual Builder – Editing the Working Manual

<u>The Toolbar</u>

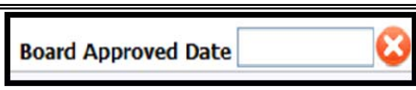
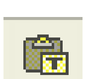
To edit policies within the *Working Manual*, click on the particular policy you want to edit. The full text at the right is contained within a content editor.

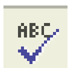
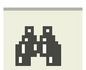
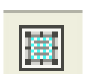
When adding or editing content, you will be in an editing environment that is very similar to MS Word. The Toolbar has many of the same tools that are used in Word.

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

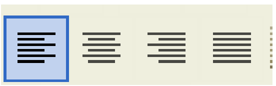
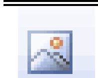
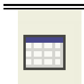
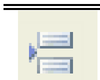
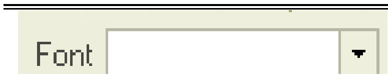
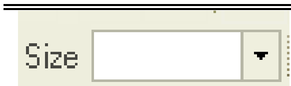
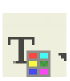
Icon	Function
	The Page Name field is the title of the Policy. This can be updated at any time. This will update the main Table of Contents in a published manual, but any changes made here will need to be manually update on the Chapter page Table of Contents
	The Section ID determines the order in which the policy appears within the Chapter. While the system does not prevent you from changing the Section ID if you want to reorder the policies within a chapter (or even move a policy between Chapters), the Master Manual and all updates will be published using the original policy number that was assigned.
	Checking the “Do Not Publish Section” box will omit this section from any manuals published from this point forward (until the box is unchecked). To set multiple sections to “Do Not Publish” at one time, see page 30. ***Tip: “Do not Publish” is useful for omitting sections that are not ready at the point of publishing, but if this section is simply not a section you want in your manual, we recommend removing it entirely. See page 29 for more information on removing policies.***

Manual Builder – Editing the Working Manual

Icon	Function
	Click into the "**Revised Date**" field to open a calendar that allows you to select the Revised Date for that policy. The Revised Date will appear below the title of the policy in the published manual. Click the  to remove the Revised Date.
	Checking the "**Auto Update Revised Date**" button will automatically place the current date in the "Revised Date" field each time the policy is saved. See page 33 for information on how to automatically check or uncheck this box on all policies in your manual.
	Click into the "**Reviewed Date**" field to open a calendar that allows you to select the Reviewed Date for that policy. The Reviewed Date will appear below the title of the policy in the published manual. Click the  to remove the Reviewed Date.
	Click into the "**Board Approved Date**" field to open a calendar that allows you to select the Board Approved Date for that policy. The Board Approved Date will appear below the title of the policy in the published manual. Click the  to remove the Board Approved Date.
	**The Source** icon allows a user to view the HTML code behind the page, and modify it directly, if desired. It is not recommended to edit the HTML code unless you have prior HTML experience.
	Common editing icons for **Cut**, and **Copy**
	**Paste Text –** Pastes text into the content as Plain Text. All formatting is removed from the text being pasted .

Icon	Function
	**Paste from Word** – Pastes text into the editor while stripping out the code used in MS Word, which can interfere with formatting in the CU PolicyPro editor. This is recommended when pasting from Word. See page 15 for more information on this tool.
	**Spell Check.** A small java applet may need to be downloaded in order for the spell check to work.
	Standard "**Undo**" and "**Redo**" icons. Users can "undo" or "redo" multiple steps.
	**Find –** Allows you to search the current policy for specific text.
	**Replace –** Allows you to search the current policy for specific text and replace it with new text.
	**Select All** – This icon will select all of the text in the editor. The shortcut for this action is CTRL+A.
	**Remove Formatting** – removes all formatting from any highlighted text
	Common editing icons for **Bold**, **Italic, Underline, Strikethrough, Subscript** and **Superscript**
	**Numbering** and **Bullets –** standard icons for applying numbering and bullet formats. See pages 16- 17 for more information on applying these styles.
	**Block Indentation**. Allows blocks of text to be indented to the right (or moved back to the left). Often used in conjunction with bullets and numbering formatting.

Manual Builder – Editing the Working Manual

Icon	Function
	**Block Quote**. Creates indention to the left and right of a block of text. Often used to offset text within a document.
	**Justify Tools**. Standard formatting tools to justify text to the **left**, **center**, **right** or **block justify**.
	**Insert/Edit Graphics**. Inserts a graphic image into the content. See pages 18-19 for more information on inserting graphics.
	**Insert/Edit Table**. Inserts a table into a table or allows editing of an existing table. See pages 20 - 21 for more information on Tables.
	**Horizontal Rule** – places a horizontal line across the screen.
	**Character Map** – allows the placement of special characters within the text.
	**Page Break –** Allows the user to manually insert a page break when this page is printed (single policy print or published manual print).
	**Font** – Standard tool to allow changes to font type face.
	**Size** – Standard tool to allow changes font size.
	**Text Color** – allows color changes to highlighted text.
	**Background Highlighting** – Highlights behind text.
	**Maximize Editor**. Increases the editor size – some toolbar icons and tools below the editor are hidden when this icon is used. Click on the icon again to restore these hidden tools.
	**Sow Blocks**. Shows individual blocks of text throughout the hdocument.

Manual Builder – Editing the Working Manual

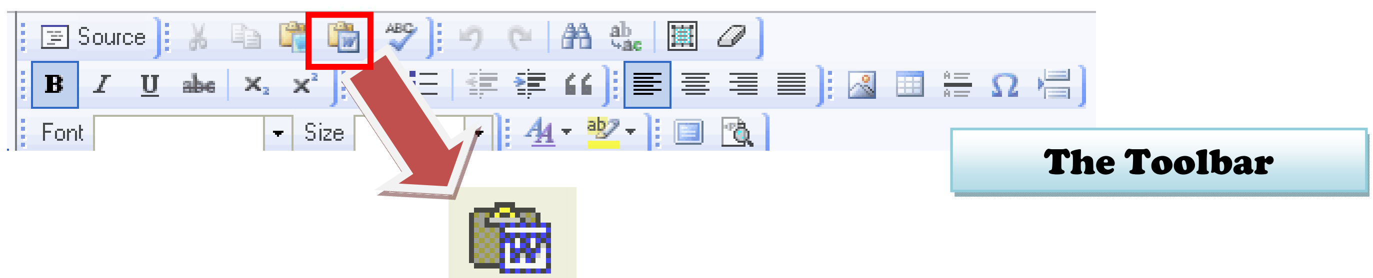
Adding and Editing Text

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.

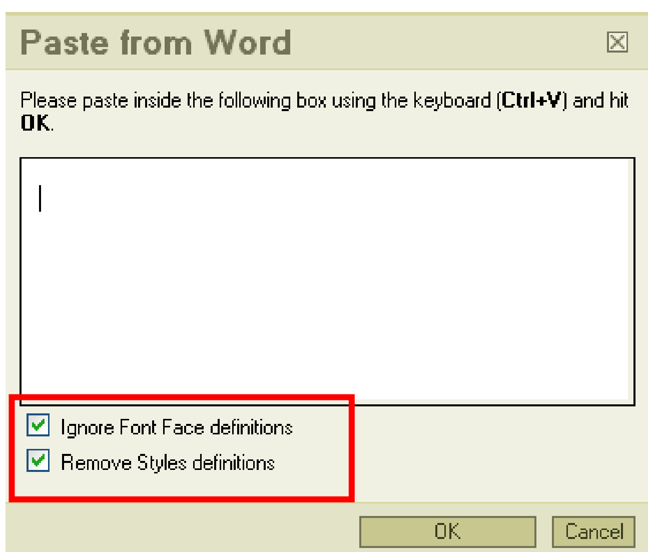
Tip: Using CTRL+V or Right Clicking to Paste Text will paste in as plain text. To keep formatting such as bold, italics and underlining from Word or other Microsoft documents, use the "Paste from Word" icon in the Toolbar (see below). Not all formatting will be retained as some formatting codes used in MS Word do not convert to HTML (such as bullets and numbered lists).

Paste From Word



When the "Paste from Word" icon is clicked, a pop up dialog box opens to allow you to paste in the content and make some additional selections. Use CTRL+V to paste the content into the dialog box.

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

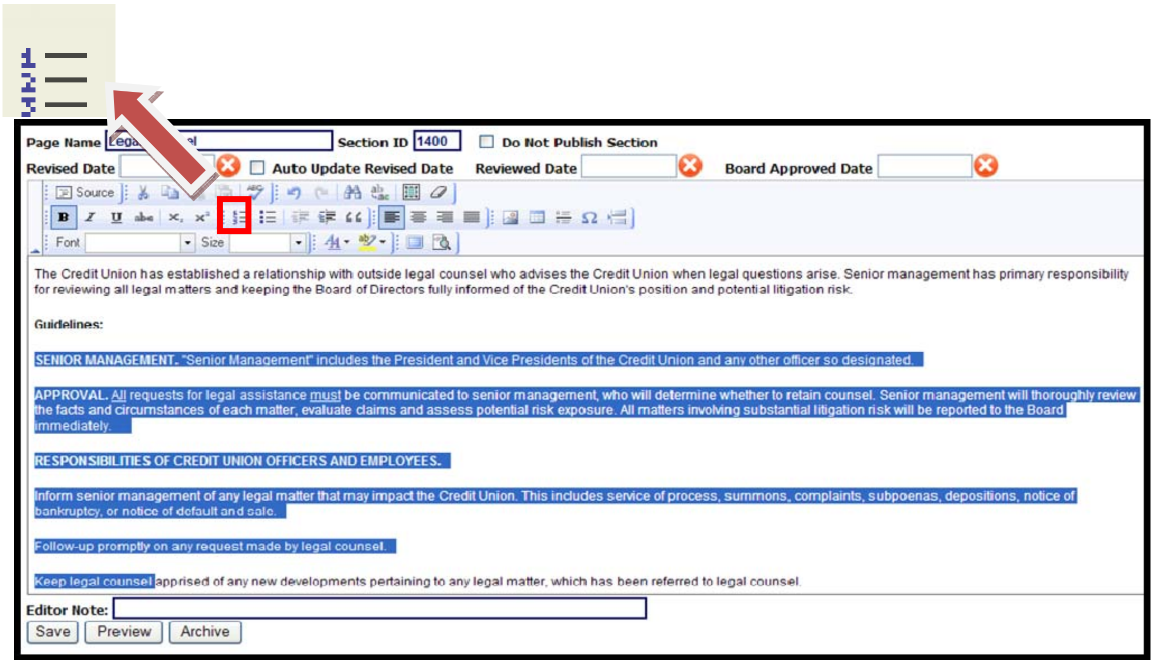


Manual Builder – Editing the Working Manual

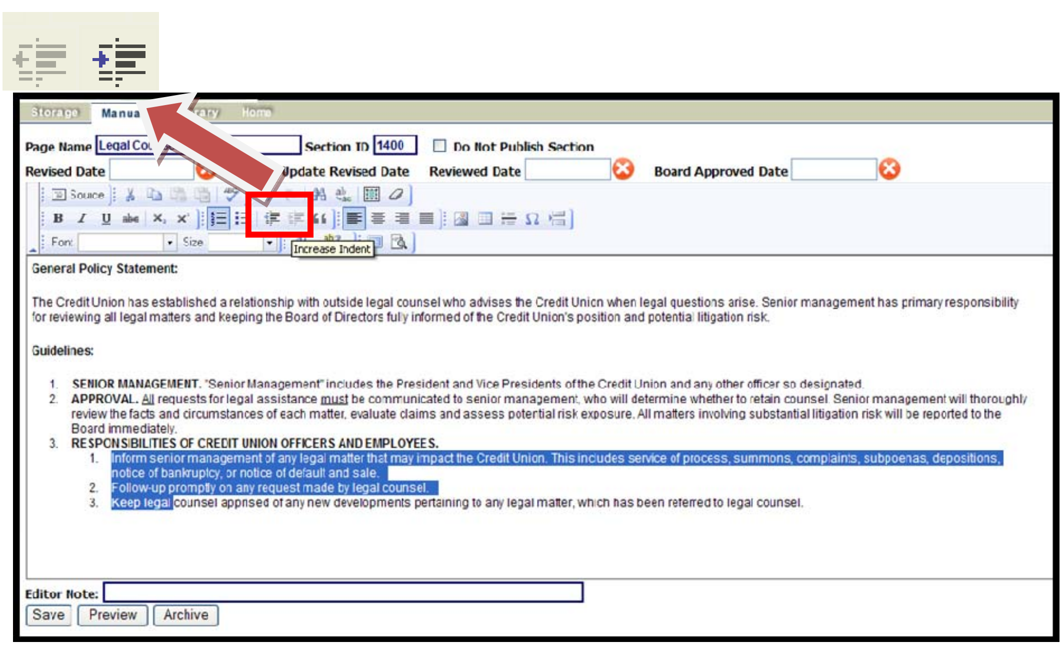
Formatting Numbered Lists

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

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



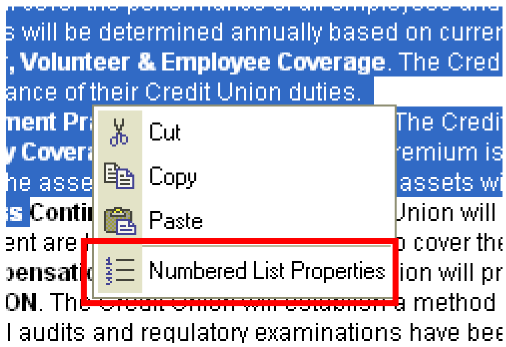
To create a sub-list, highlight the text that should be indented, and use the “Block Indentation” icon.



Manual Builder – Editing the Working Manual

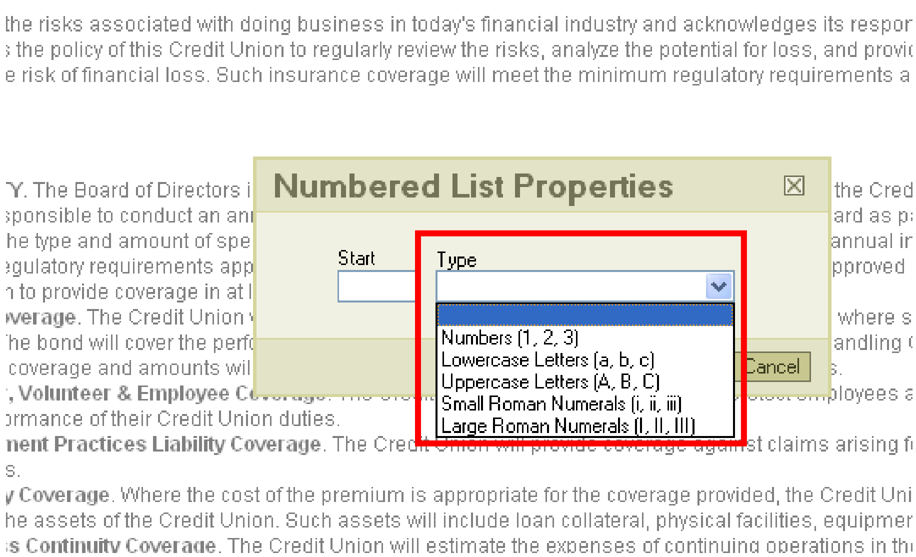
Formatting Numbered Lists (continued)

By default, the sub-list will have the same numbering structure as its parent list. To change the style of the numbered list, right click on the highlighted text, and choose “Numbered List Properties”



A dialog box will pop up with several different numbering styles to choose from (in a dropdown list). Choose the style you prefer and click OK. You can also use this dialog box to start the numbering or sub-numbering at a particular number.

Note: Bulleted lists work similarly, in using the block indentation for sub-lists and right clicking for Bulleted List Properties, which give several bullet styles to choose from.



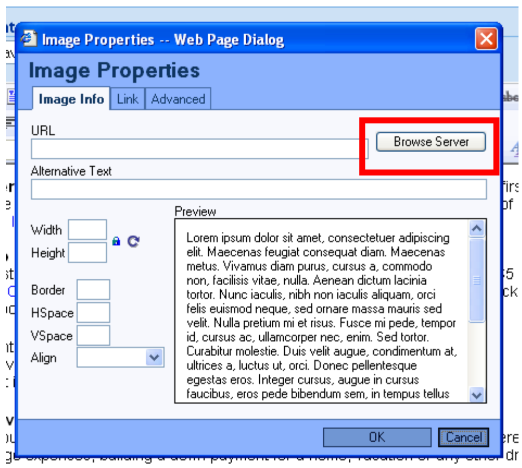
Tip: By default, the system will keep each item in a numbered list together with no spacing between each item. To create a line break of space, place your cursor at the end of the first item, and hold the SHIFT key as you press enter (SHIFT+ENTER). Then press the space bar to add a “space” in the newly created line break. The “space” character acts as a place holder during the publishing process, making your line breaks appear as you expect.

Manual Builder – Editing the Working Manual

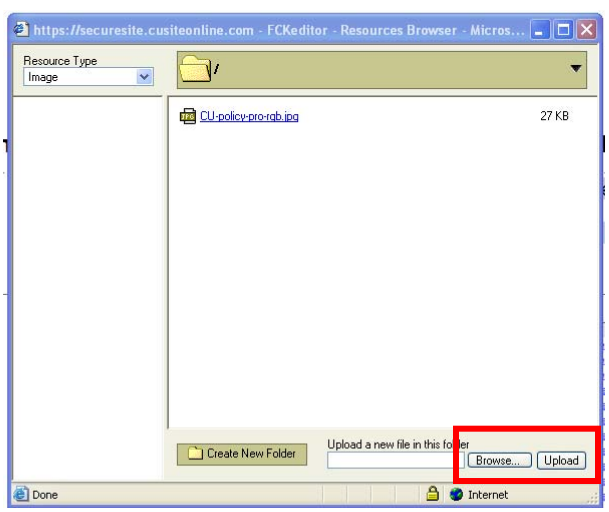
Inserting and Editing Graphics

To insert a graphic:

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



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



<u>Inserting and Editing Graphics (continued)</u>

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

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

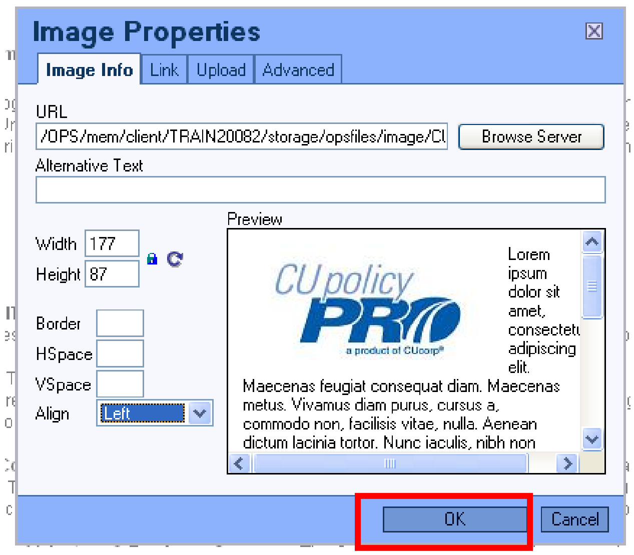


Image Properties
You can change image properties prior to inserting the image or after an image has been inserted. To change properties after the image in inserted, right click on the image and choose "Image Properties".

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

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

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

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

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

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

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

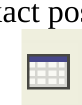
Note: Your uploaded images will be stored (and are visible) in the Storage Area (file Opsfiles > Image). Do Not Delete these files from the Storage area or they will not be available for your manual! Images uploaded to this folder through the Storage area are also available when adding images to a page.

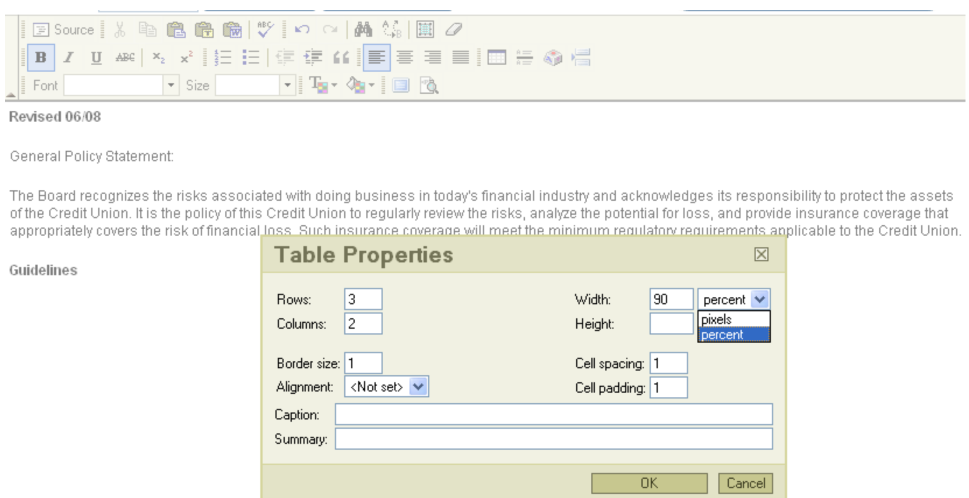
Manual Builder – Editing the Working Manual

Inserting and Editing Tables

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

To insert a table:

1. Make sure your cursor is in the exact position where you want the table inserted.
2. Click the "Insert/Edit Table" icon. 
3. A form will pop up giving you some options to customize your table.
4. When you have set your table options, click OK to insert your table.



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

Rows: The number of rows for your table

Columns: The number of columns for your table

Border Size: the size of the border around your table. The larger the number, the thicker the border. A size of "1" is most common. A border of "0" will remove the gridlines, essentially creating a hidden table on the page. This is useful to create columns on a page.

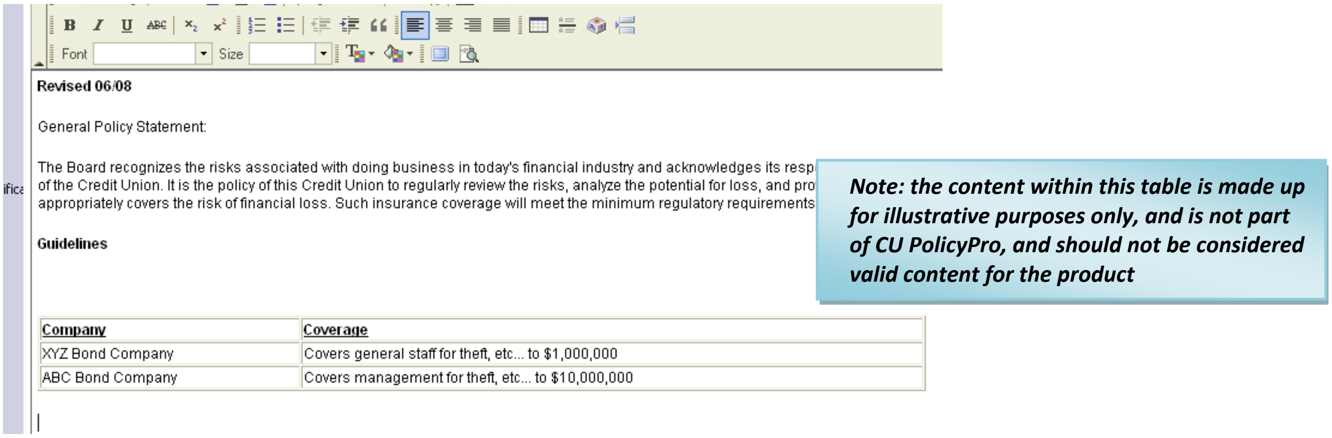
Alignment: Aligns the table the left, right or center of the page. If nothing is selected, default is "left"

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

Manual Builder – Editing the Working Manual

Inserting and Editing Tables (continued)

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



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

Use a right click of the mouse on your table to view the available options.

- Rows and Columns can be deleted (use Row or Column options).
- Cells can be merged or split (use Cell options).
- You view/modify properties of the entire table (use Table Properties).

Tip: The columns will automatically adjust based on the amount of text in each. While there is no "set column width" option per se, you can use "Cell Properties' under the Cell Options area to set the width of the first cell in each column. This essentially sets column width. We recommend setting the cell width in percentages. This sets the cell (column) 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%!

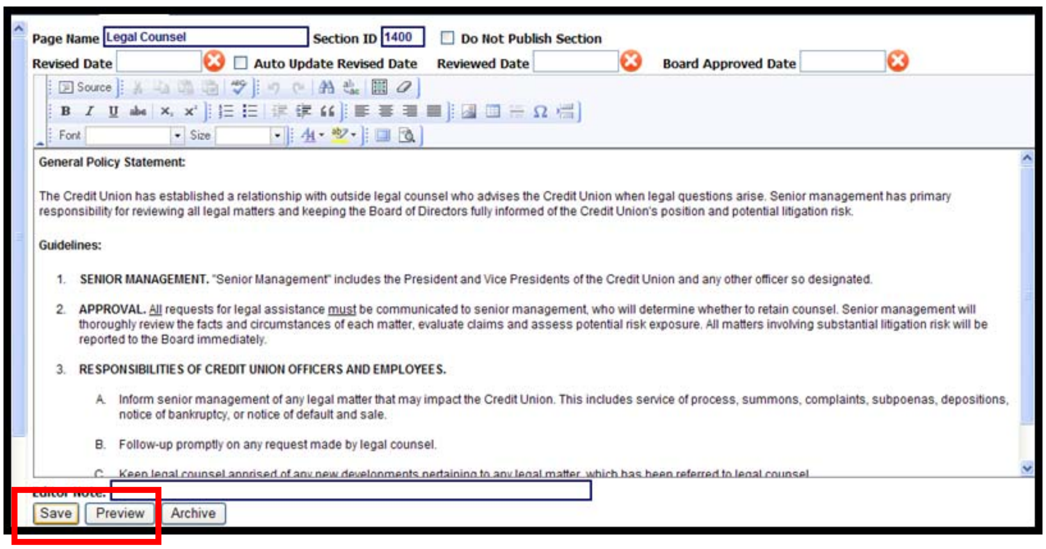
Manual Builder – Editing the Working Manual

Previewing and Saving Your Work

Once you have completed the edits and formatting for your policy and are happy with your changes, use the “Save” button to save your work.

Use the “Preview Section” Button directly below the content editor to view how the policy will look when printed. You can also print this single policy from the “Preview”.

Tip: The preview will only show you the content that has been saved.



The Archive Button is also available underneath the Content Area. For more information on Archiving, see pages 26 and 31.

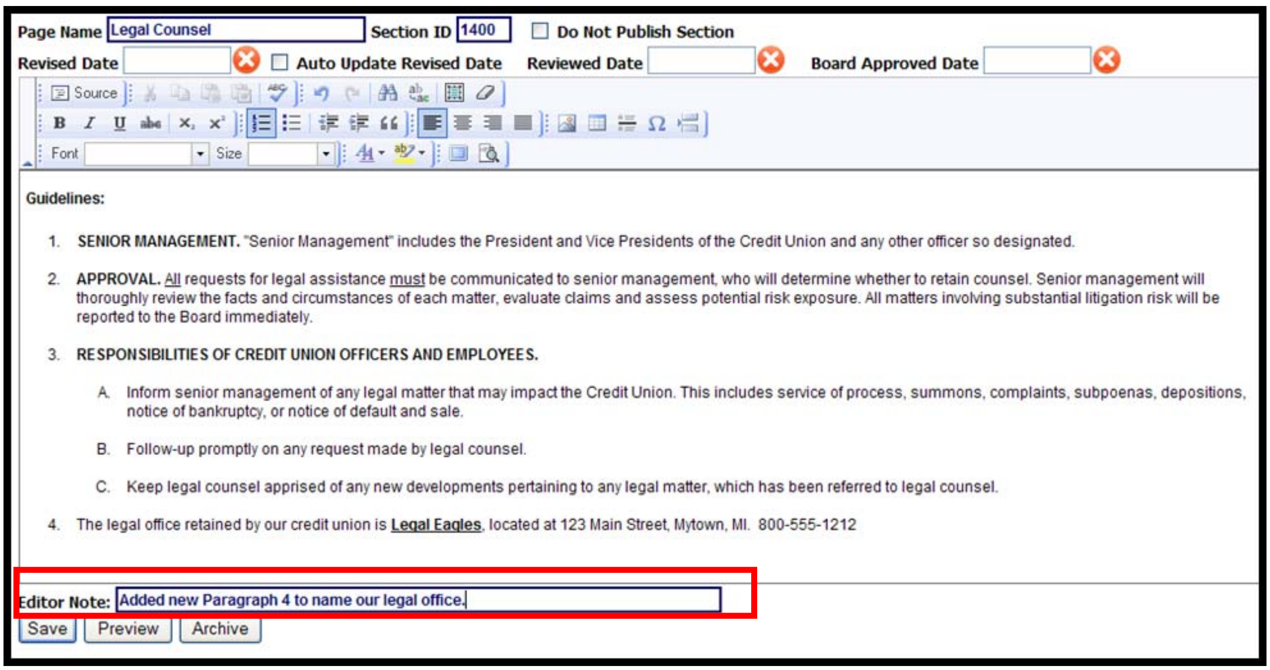
Manual Builder – Editing the Working Manual

Editor's Notes

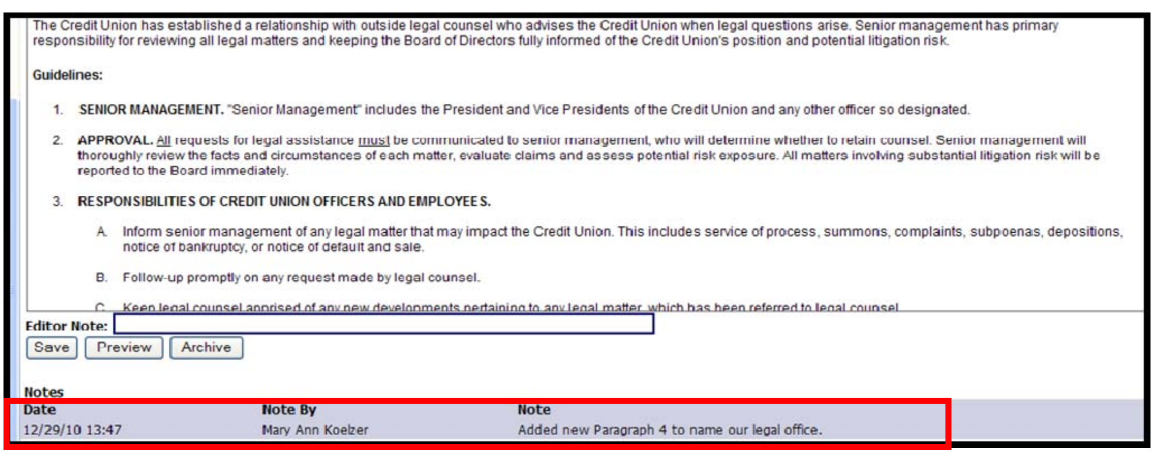
Each policy has Editor's Notes available directly beneath the content. These notes appear only on the editing screen of the individual policy or in the "Policy Notes Report." See page 43 for more information n the Policy Notes Report.

As content is customized, these editing notes can help users know what has been customized for each policy, so that if the master content is updated, it is easier to determine how much custom content is included in any given policy.

Simply type in your comment, and 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).



Once the note is saved, the most recent notes will show below the content (up to five will show).



Manual Builder – Editing the Working Manual

<u>Key Fields</u>

We have developed a series of *Key Fields* to assist you in inserting Credit Union specific information in the Manual. Key Fields are bits of information which are important to completing the policy, but will vary from credit union to credit union. An example of a Key Field would be the maximum amount to be considered an expense.

Not every policy has Key Fields, and some policies have many Key Fields. A full list of the Key Fields, which includes the location of each Key Field, the Key Field number, and a brief description of the Key Field can be found by clicking on the *Manual Administration* folder, and clicking on the right side link titled <u>Key Fields Guide</u>.

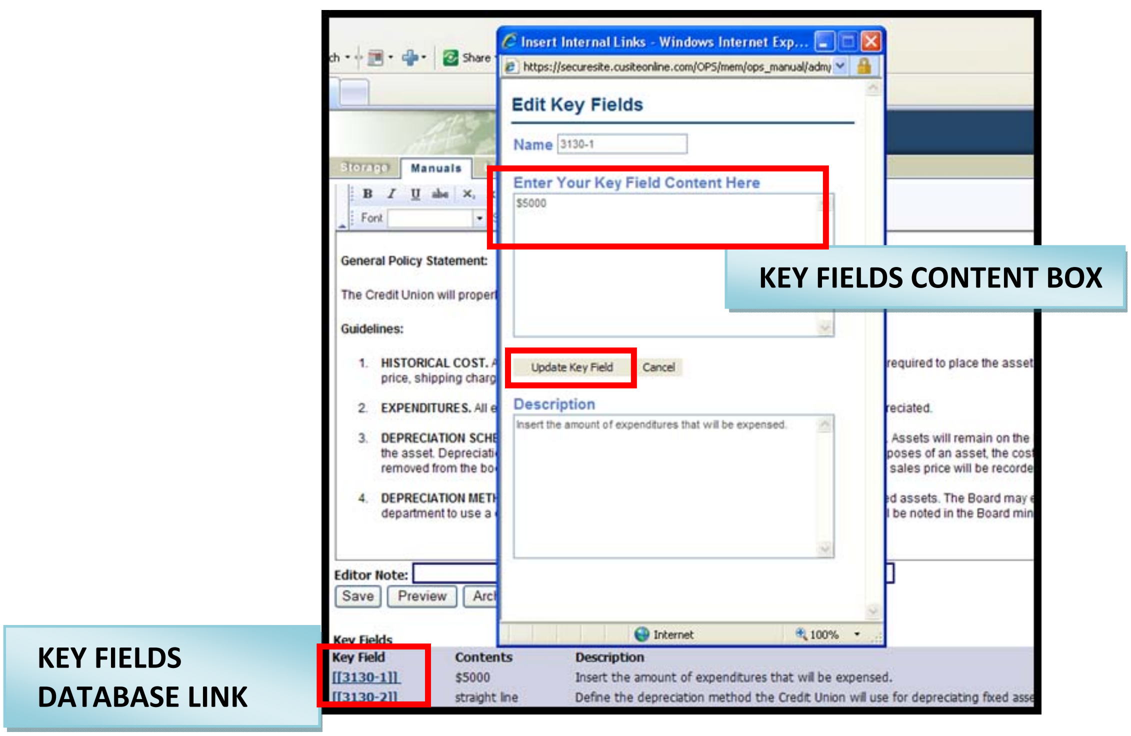
The Key Fields are numbered and enclosed in brackets (e.g., [[2400–1]]). The first number of the Key Field correlates to specific policy numbers, making them easy to find throughout the Manual.

For each policy that contains a Key Field, all Key Fields are listed directly below the content area in a blue highlighted area. There is a link to the Key Field database editing window, a listing of the content entered for the Key Field (by default, the content is the Key Field number), and a description of the Key Field.

Clicking on the Key Field link opens the “Edit Key Fields” dialog box.

Edit the Key Field in the box labeled “Enter Your Key Field Content Here” area of the dialog box.

Click the “Update Key Field” button when all done.

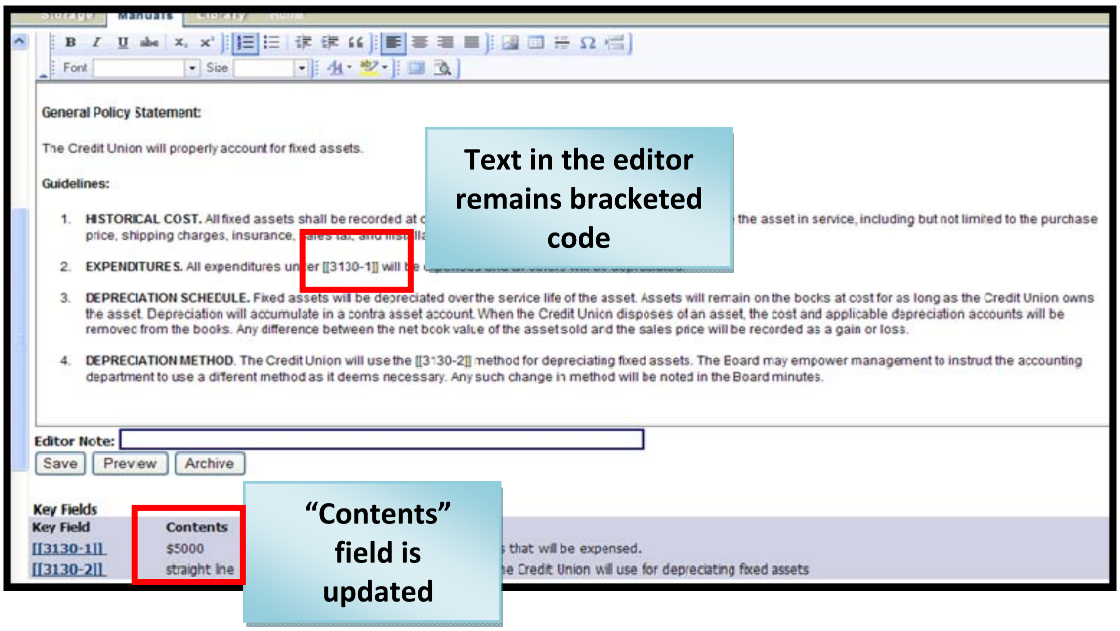


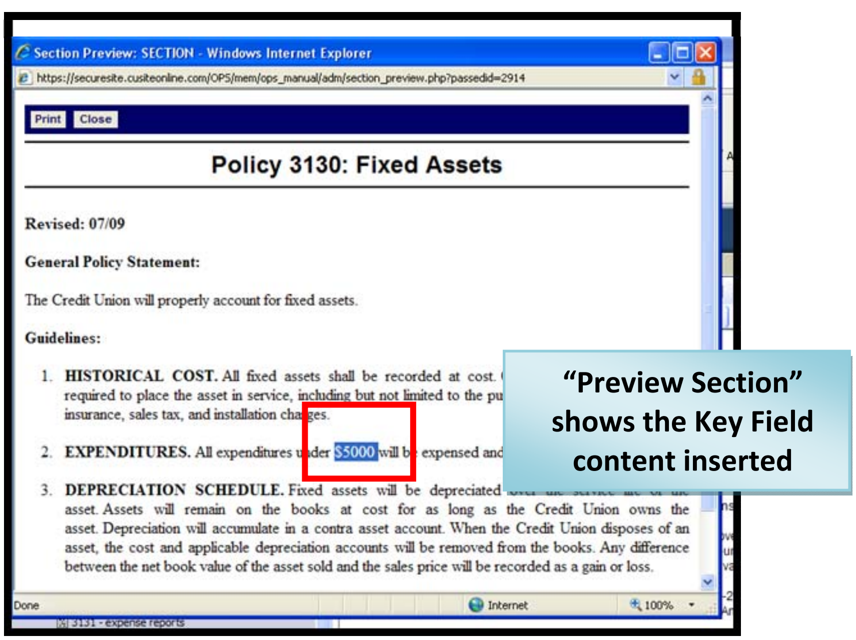
Manual Builder – Editing the Working Manual

Key Fields (Continued)

Once you have updated the Content of the Key Fields, you will need to save the policy in order for your content to appear in the highlighted Key Fields area.

You will notice that once you save, the "Contents" field of the highlighted area is updated, but the actual text within the editor still shows the bracketed key field number. This is because within the text the bracketed number is a piece of code that will be replaced with the Key Field "Contents" once it is printed. Use the "Preview Section" button to see the Key Field replacement. Publishing the manual will also insert the correct text into the Key Field code area.





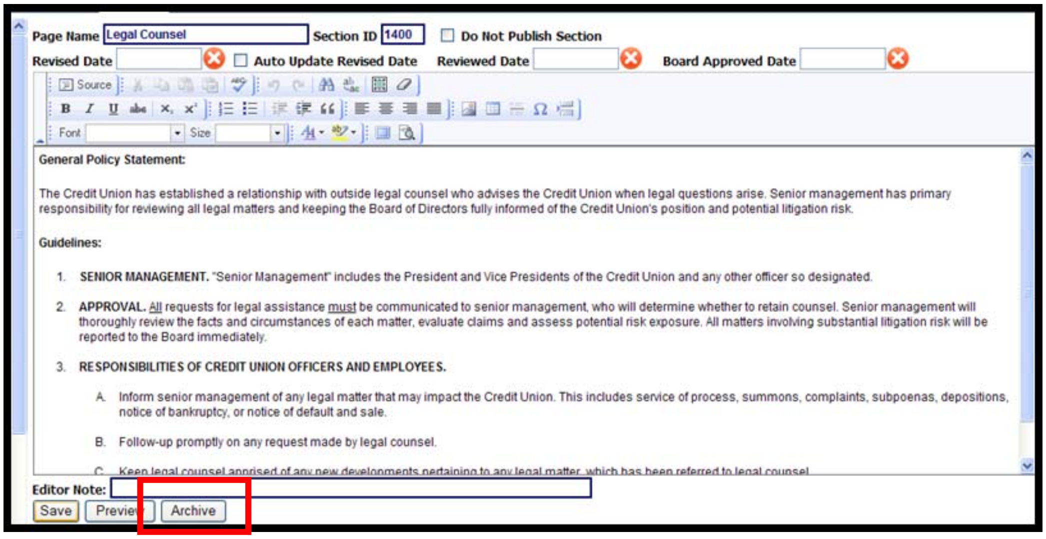
Note: See pages 34 and 41 for more information on the Key Fields Database and Reviewing a report of all your defined key fields

Manual Builder – Editing the Working Manual

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*.

To archive a policy, click the "Archive" button below the content.



This will make a 'point in time' copy of this policy. Once in the *Archive*, the archived version of the policy can be viewed, printed or restored back to the Working Manual.

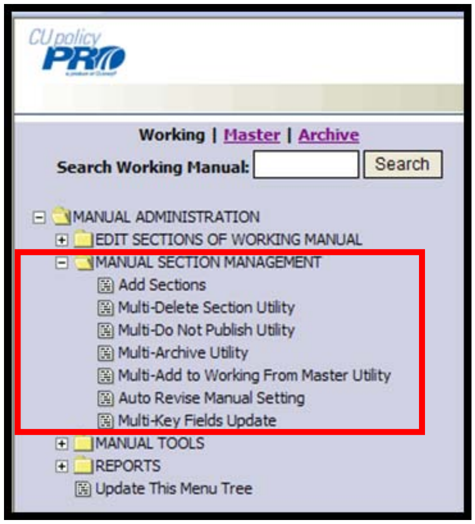
Tip: Use the archive to save copies of policies that you have customized for the credit union. Policies with Master content only, that have not been customized at all, can always be restored from the *Master*. This will help keep your *Archive* area easier to maintain.

Note: See page 31 for instructions on archiving multiple policies at one time

Manual Builder – Manual Section Management

Below the *Edit Section of Working Manual* is a folder called *Manual Section Management*.

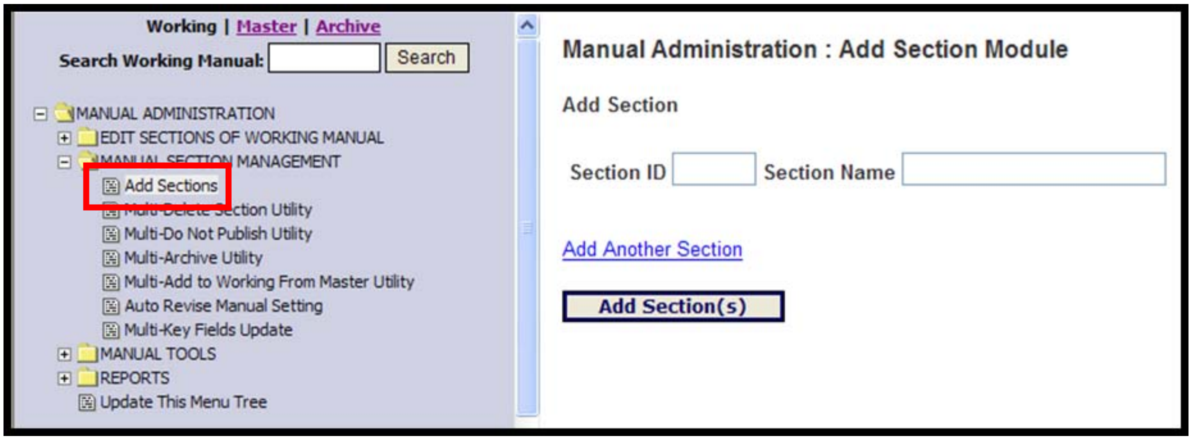
This area allows you to **Add** policies, **Delete** policies, set multiple policies of the *Working Manual* to "**Do Not Publish**", **Archive** policies, **move policies** from the *Master Manual* to the *Working Manual*, check the "**auto revise date**" across all sections of the *Working Manual*, and edit **Key Fields**.



Manual Builder – Manual Section Management

Adding a new Chapter or Policy

Click the “Add Sections” link in the *Manual Section Management* folder.



To add a policy, type in the policy number and the policy name, and click the “Add Section” button. The new policy will appear in the Working Manual in numeric order.

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

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

Tip: All sections must be numbered 1001 or greater. Section numbers below 1000 have no associated Chapter folder and will not be accessible for editing in the *Working Manual*.

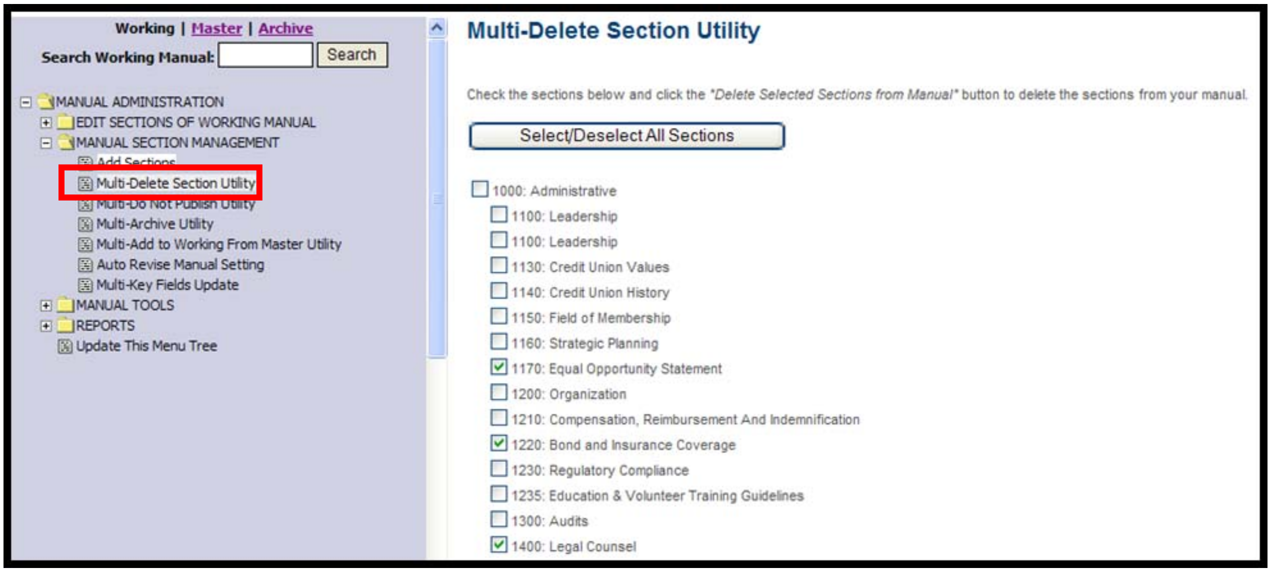
Manual Builder – Manual Section Management

Removing Policies

Click the "Multi-Delete Section Utility" link in the *Manual Section Management* folder.

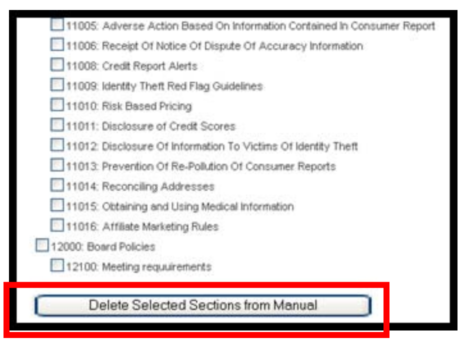
This brings up a form listing all the sections in your *Working Manual*, with a checkbox next to each section.

Click on all the sections you want to delete.



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

The selected policies will be removed from your *Working Manual*.



Sections that are removed are permanently deleted! If you wish to keep a copy of a particular section, Copy the section to Archive (see page 26 or 31) BEFORE you delete it.

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 *Working Manual*. They will, however, appear in the published manual.

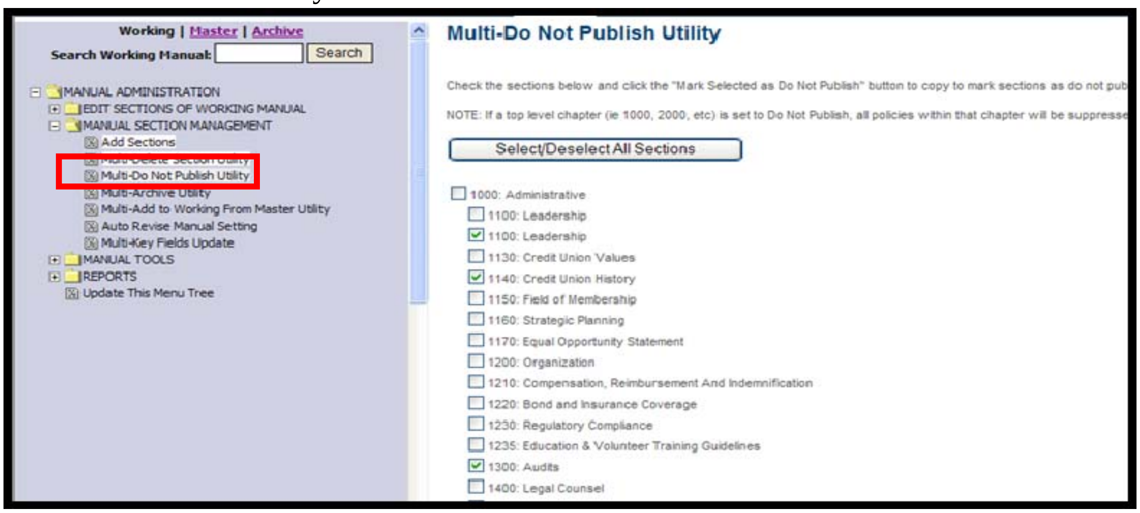
Manual Builder – Manual Section Management

Setting Multiple Sections to "Do Not Publish"

Click the "Multi-Do Not Publish Utility" link in the *Manual Section Management* folder.

This brings up a form listing all the sections in your *Working Manual*, with a checkbox next to each section.

Click on all the sections you want to set to " Do Not Publish"



Scroll to the end of the page and click the "Mark Selected as Do Not Publish" button.

The selected policies will be marked as "Do Not Publish" in your *Working Manual*.

Note: Setting the Chapter Folder (1000, 2000 etc) to "Do Not Publish" will suppress <u>all</u> policies within that chapter from publishing, regardless of the individual policy setting.

Note: This section will always retain the checkbox for any section that has been set to "Do Not Publish". You can use this area as a report to view which sections will be suppressed from publishing at any given time.

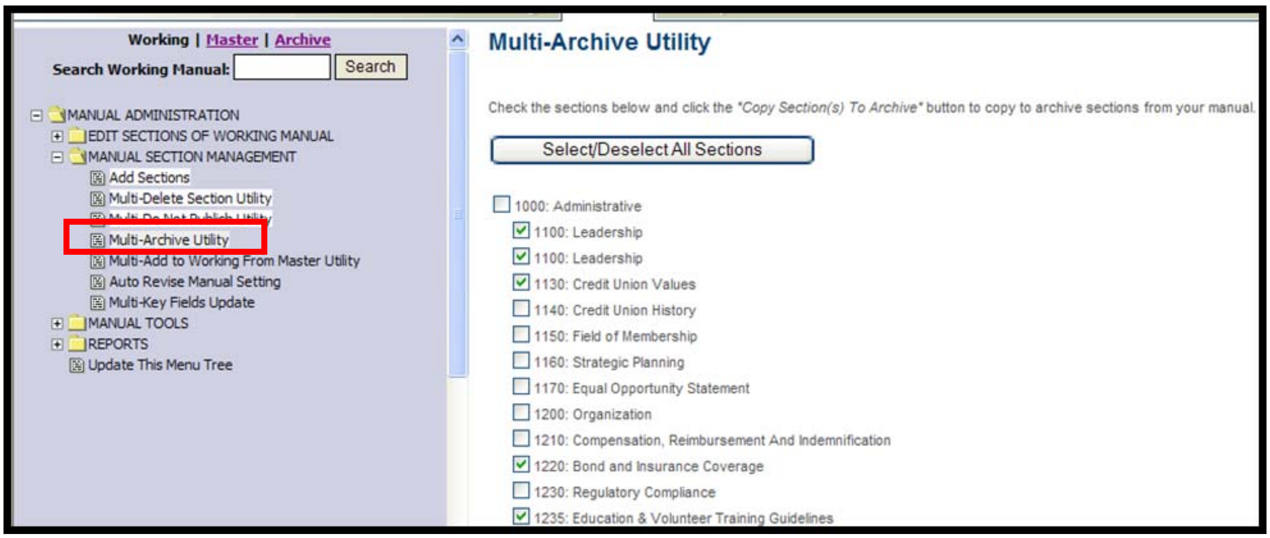
Manual Builder – Manual Section Management

<u>Archiving Multiple Sections at one time</u>

Click the “Multi-Archive Utility” link in the *Manual Section Management* folder.

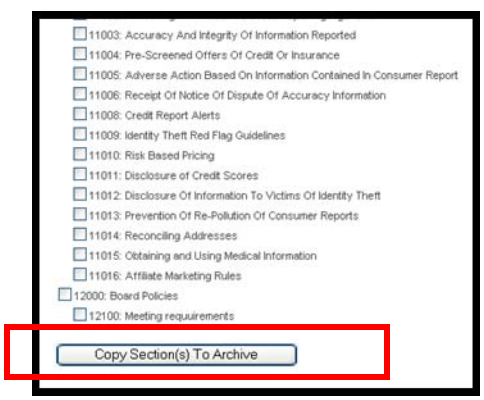
This brings up a form listing all the sections in your *Working Manual*, with a checkbox next to each section.

Click on all the sections you want to place a copy to Archive



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

A point in time copy of the current version of each section will be added to the *Archive*.



See page 46 for information on viewing and restoring policies placed in Archive.

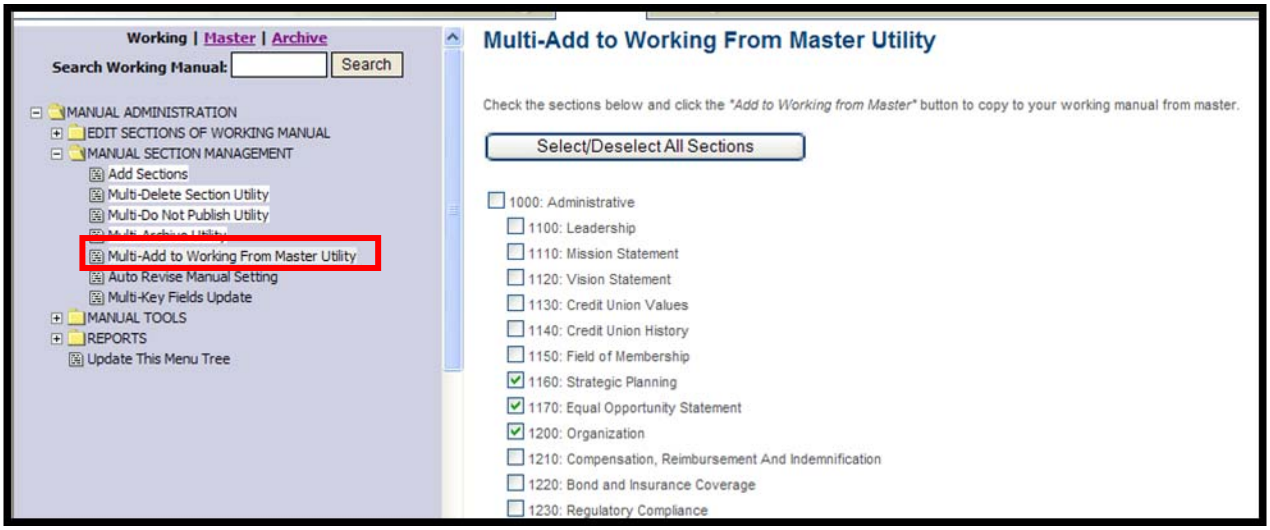
Manual Builder – Manual Section Management

<u>Adding Multiple Sections to the Working Manual from the Master at one time</u>

Click the “Multi-Add to Working from Master Utility” link in the *Manual Section Management* folder.

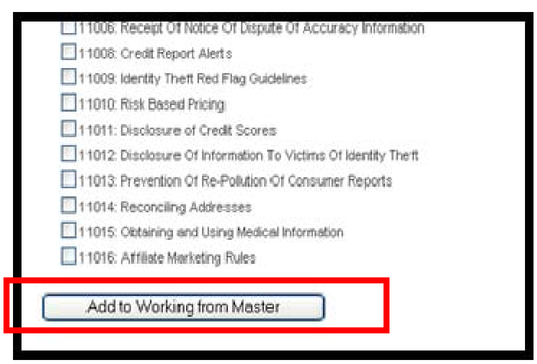
This brings up a form listing all the sections in the *Master Manual*, with a checkbox next to each section.

Click on all the sections you want to move from the *Master Manual* to your *Working Manual*.



Scroll to the end of the page and click the “Add to Working from Master” button.

The current *Master* version of each selected policy will be added to your *Working Manual*.



Tip: If you are adding a new policies to your working manual, this is the only step necessary. If you are replacing any old policies in your *Working Manual* with updated policies in the *Master Manual*, first remove all the old policies from your Working Manual (see page 29 to remove policies), then bring in the updated policies. Bringing in an updated policy will not overwrite the old policy, but you will then have two policies (the old and the new) in your Working Manual.

Manual Builder – Manual Section Management

Auto Revise Manual Setting

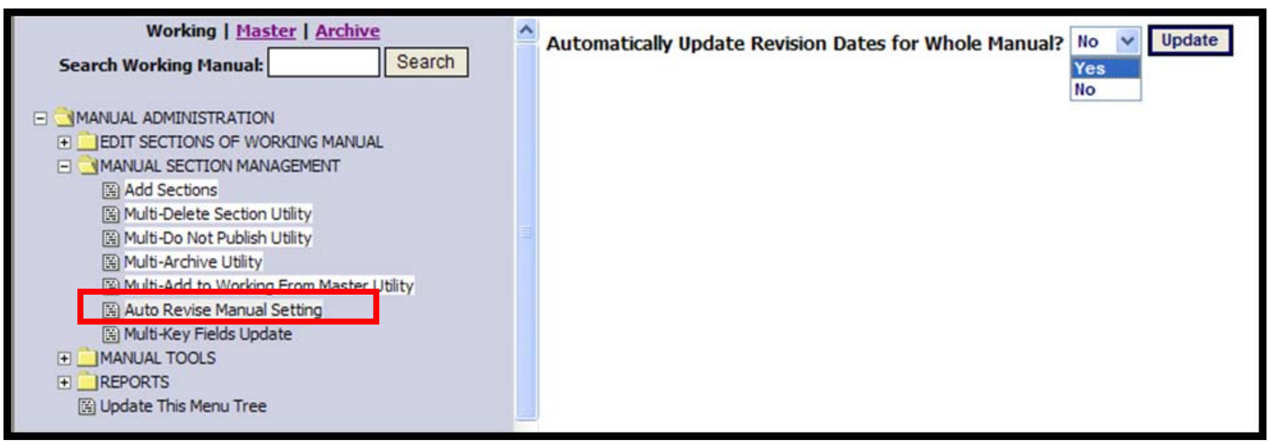
The "Auto Revise Manual Settings" tool allows you to automatically check or uncheck the "**Auto Update Revised Date**" button across all sections of the working manual.

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

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

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

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



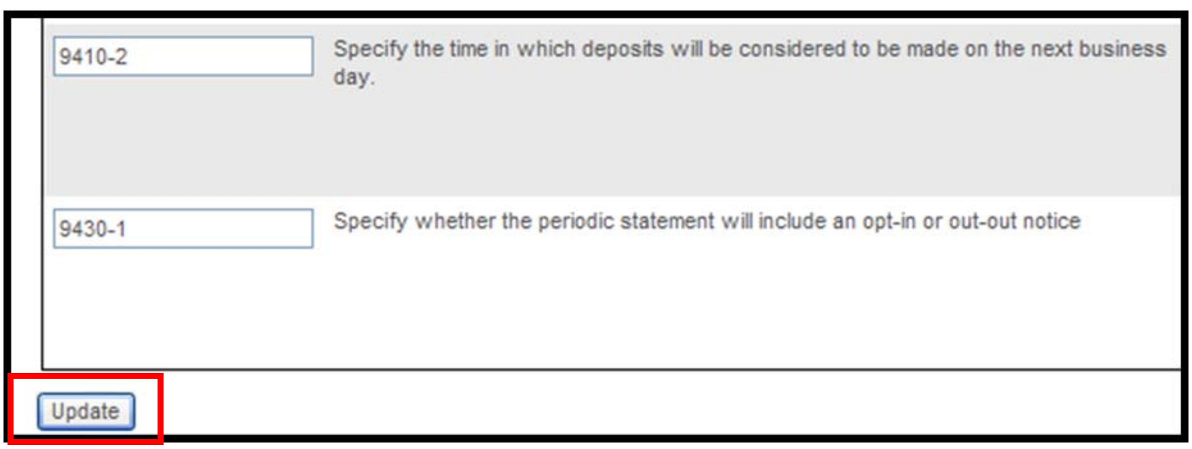
Manual Builder – Manual Section Management

Multi-Key Fields Update

Click the “Multi-Key Fields Update” link in the *Manual Section Management* folder.

This brings up a form listing all of the Key Fields in the system and their current content. The Key Field content can be edited for any of the Key Fields, making it easy to review and update multiple Key Fields at one time. Click into the content area and make any necessary changes.

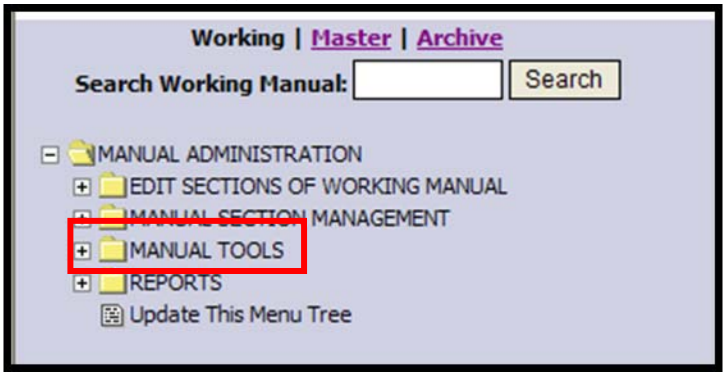
When you are finished editing, scroll all the way to the bottom and click the “Update” button to save your changes.



Manual Builder –Working Manual Tools

Manual Tools

Below the *Working Manual* is a folder called *Manual Tools*.



This area allows you to Publish your manual and Manage your previously published manuals.

Manual Builder –Working Manual Tools

Publishing the Manual

Clicking the Publish Manual link will begin a process in which all the individual policies of the Working Manual are combined into one printable document. Publishing does not remove any content from your Working Manual, but simply outputs the content to a printable source. 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.

Before publishing, you should ensure that all sections to be excluded have been set to DO NOT PUBLISH. See page 30.

On the right side of the screen, a series of options are presented to customize your published manual. See next page for a screen shot of the options presented.

Published Manual Name: This will be the title of the published document. By default, the name of the Working Manual will be prefilled in this field. Be specific when titling your manual (i.e. Security & ALM Policies, Policies for Board Review on 11-15-10, Entire Policy Manual, etc). This will help all users viewing published manuals know what content to find in each published document.

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

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

Include Corporate Logo: This option is only available if a Corporate Logo has been uploaded. (see page 64 for information on uploading your logo). If checked, the logo will appear on the title page of the published manual.

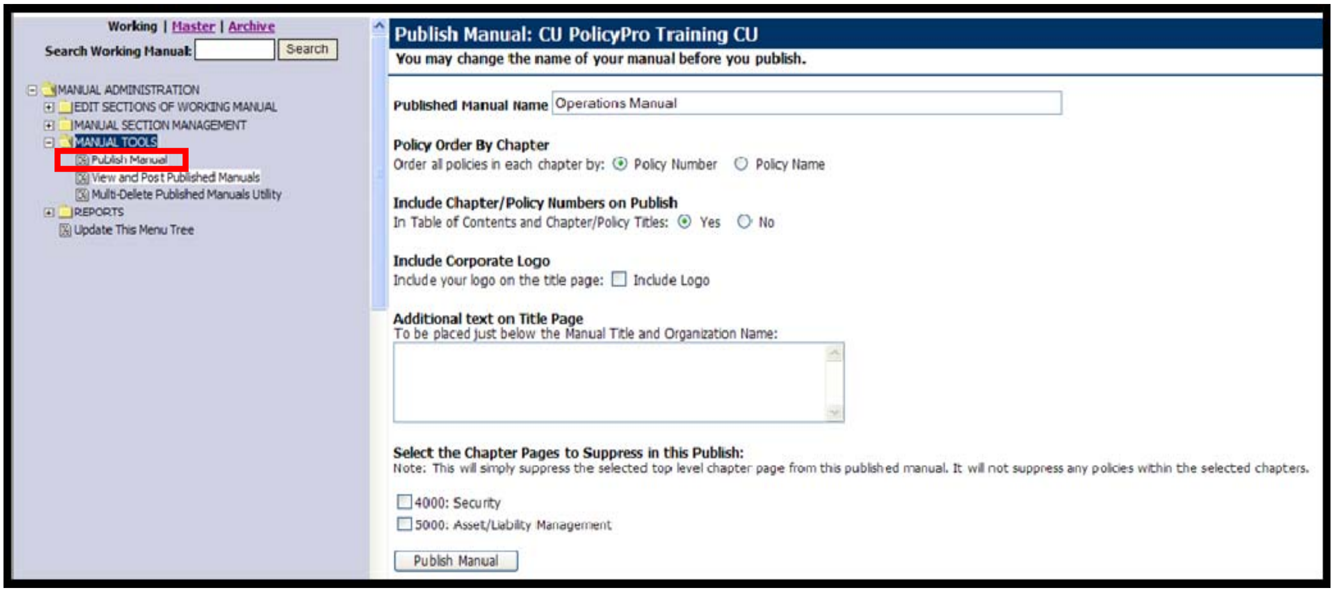
Additional Text on Title Page: This allows the user to add more information on the title page of the manual. Example: These policies are for review only and are not yet board approved.

Select the Chapter Pages to Suppress in Publishing: This setting allows any or all Chapter pages included in the publish to be excluded from the document. This is not the same thing as DO NOT PUBLISH. A top level Chapter page **must** be included in the publish in order for any policies within that chapter to appear, however, you may not want that top level Chapter page itself to show in the publish. This allows you to determine if the top level Chapter page will appear or not.

Once you have chosen all your options, click the "Publish Manual" button. See screen shot on following page.

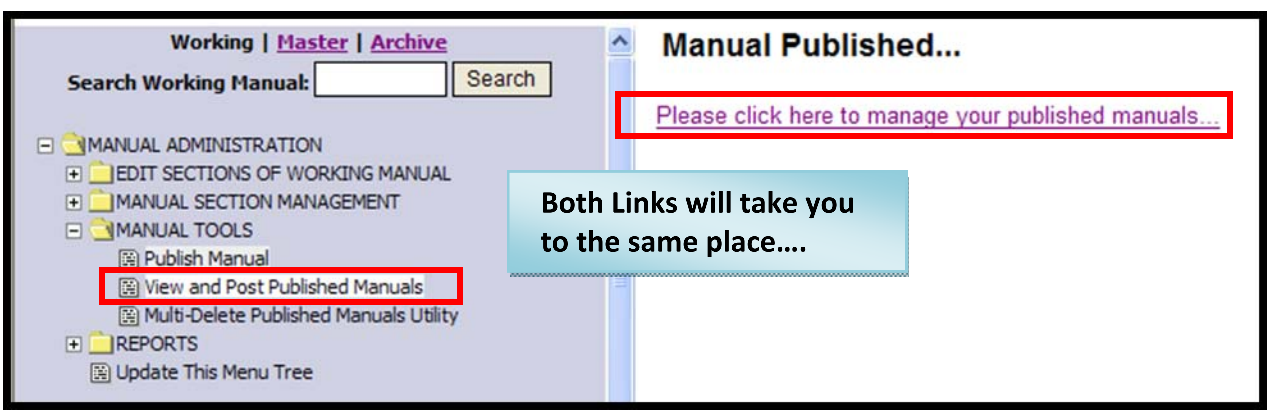
Manual Builder –Working Manual Tools

Publishing the Manual (continued)



Note: When you publish, a confirmation message will appear. Click OK.

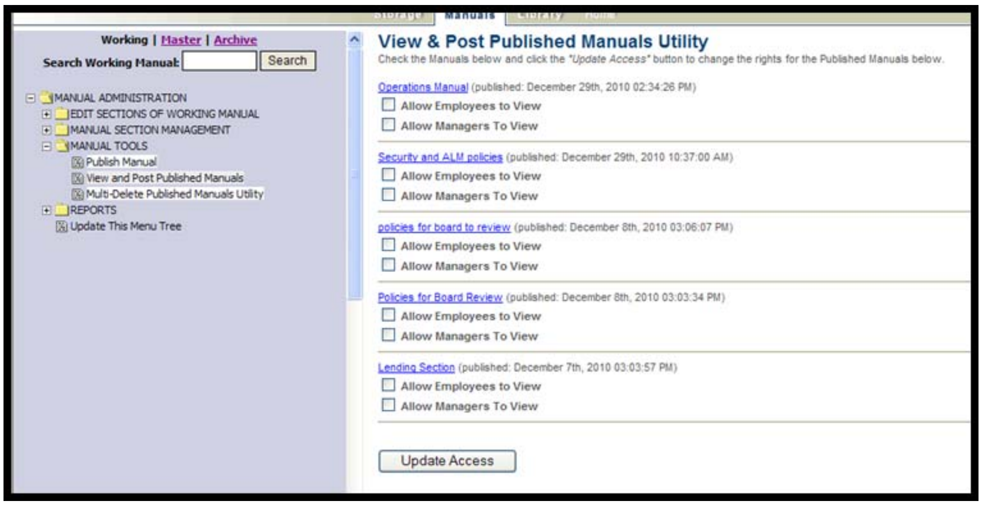
When you manual is published, a link “Please click here to manage your published manual” will appear. This will take you to the same place as the “View and Post Published Manuals” Link on the left navigation.



Manual Builder –Working Manual Tools

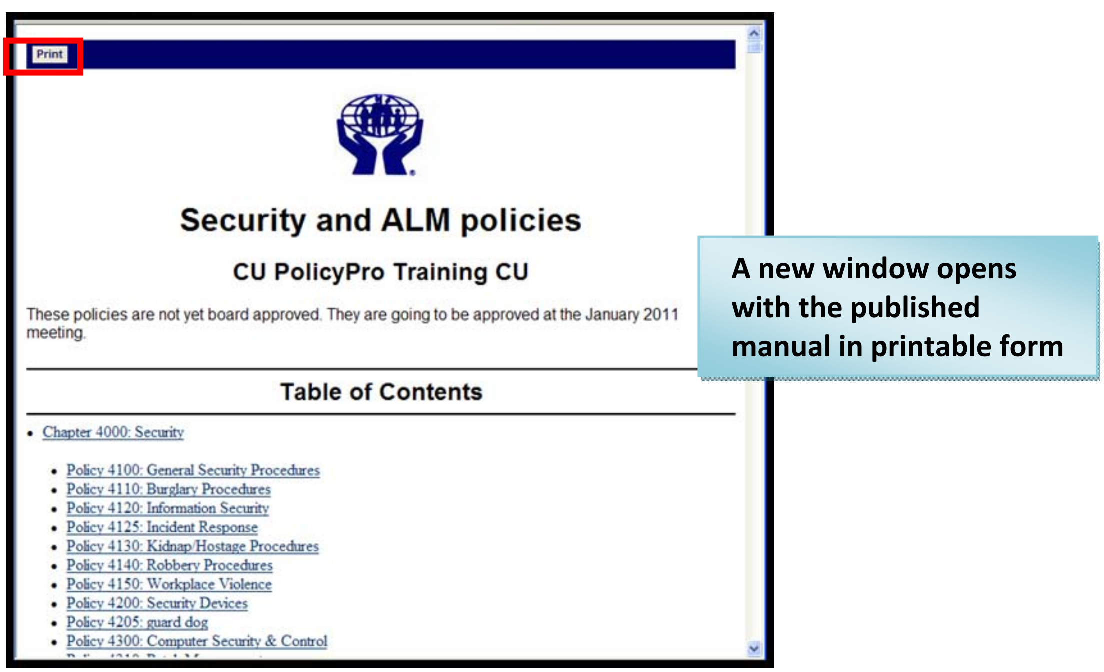
View and Post Published Manuals

In the "View and Post Published Manuals" area, you to view and print any of your published manuals, , or make any published manual available for viewing on the Home Page for in the Manager Manual and/or Employees Manuals folder.



Viewing and Printing a Published Manual

To view or print a published manual, click on the link (the name of the manual). This will open a new window with the HTML document. Click on the "Print" button in the top left to print the published manual.

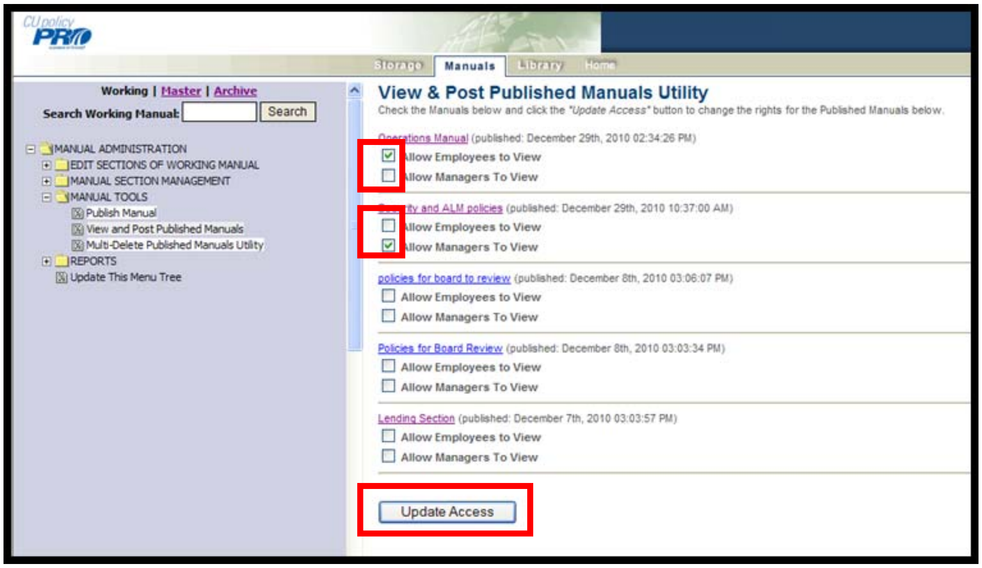


Manual Builder –Working Manual Tools

<u>Posting Published Manuals on the Home Page</u>

Links to Published manuals can be made available on the Home Page, within the “Manager Manuals” and/or the “Employee Manuals” folders.

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. Click the “Update Access” button when finished.



<u>Removing Published Manuals on the Home Page</u>

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

Click the “Update” button when finished.

Manual Builder –Working Manual Tools

Deleting Published Manuals

To delete a published manual, click the "Multi-Delete Published Manuals Utility" link under *Manual Tools*.

A list of all published manuals will show on the right side of the screen.

Choose the checkboxes next to any manual you wish to delete.

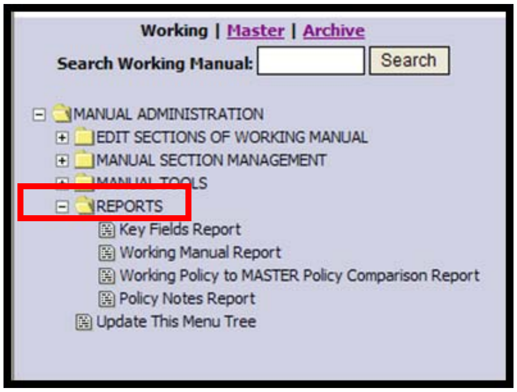
Click the "Delete Published Manuals" button.
Note: Deleted manuals cannot be recovered.

Printing Tips

See Appendix A and Appendix B for printing tips.

Reports

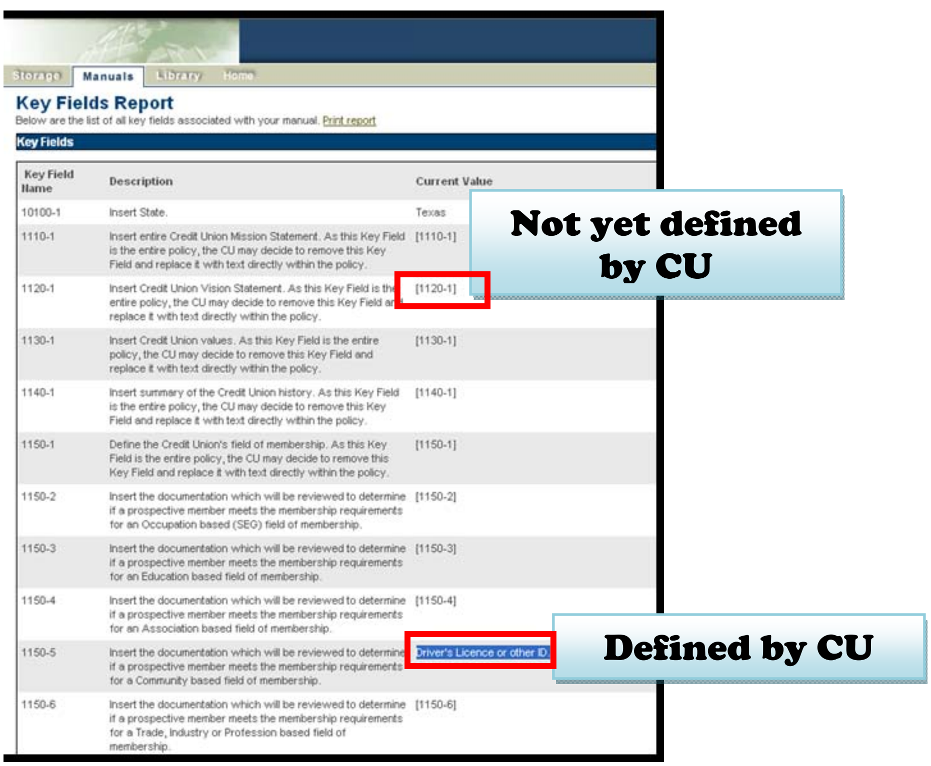
A series of reports are available to help you better manage your policies. To access reports, expand the REPORTS folder in the left hand navigation.



<u>Key Fields Report</u>

The “Key Fields Report” is a quick view all of how all the Key Fields in the system have been defined. Clicking this link will bring up a list of all the Key Fields for your manual. Scrolling your mouse through the list will show you the description for the Key Field and any text you may have entered to define that Key Field.

Click on “Print Report” for a printed copy.



Reports

Working Manual Report

The Working Manual Report will show key dates for all of the policies in the Working Manual, including the "Last Saved", "Revised", "Reviewed". "Board Approved", and "Added to Working from Master" dates.

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

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

Working | Master | Archive

Search Working Manual: Search

- MANUAL ADMINISTRATION
  - EDIT SECTIONS OF WORKING MANUAL
  - MANUAL SECTION MANAGEMENT
  - MANUAL TOOLS
  - REPORTS
    - Key Fields Report
    - Working Manual Report
    - Working Policy to MASTER Policy Comparison Report
    - Policy Notes Report
  - Update This Menu Tree

Working Manual Report

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

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

Chapter/Policy

Section	Name	Last Saved	Revised	Reviewed	Board Approved	Added to Working from Master
1000	Administrative	12/29/10	NONE	NONE	NONE	12/10/10
1100	Leadership	NONE	NONE	NONE	NONE	11/24/10
1100	Leadership	12/08/10	11/04/10	11/17/10	11/24/10	11/24/10
1130	Credit Union Values	NONE	NONE	NONE	NONE	12/08/10
1140	Credit Union History	NONE	NONE	NONE	NONE	12/08/10
1150	Field of Membership	12/08/10	NONE	NONE	NONE	12/08/10
1160	Strategic Planning	NONE	NONE	NONE	NONE	NONE
1170	Equal Opportunity Statement	NONE	NONE	NONE	NONE	NONE
1200	Organization	NONE	NONE	NONE	NONE	NONE
1210	Compensation, Reimbursement And Indemnification	NONE	NONE	NONE	NONE	NONE
1220	Bond and Insurance Coverage	NONE	NONE	NONE	NONE	NONE
1230	Regulatory Compliance	NONE	NONE	NONE	NONE	NONE
1235	Education & Volunteer Training Guidelines	NONE	NONE	NONE	NONE	NONE
1300	Audits	NONE	NONE	NONE	NONE	NONE
1400	Legal Counsel	12/29/10	NONE	NONE	NONE	NONE
1500	Staffing	NONE	NONE	NONE	NONE	NONE
1510	Nepotism	NONE	NONE	NONE	NONE	NONE
1520	Succession Planning	NONE	NONE	NONE	NONE	NONE
1600	Code of Ethics	NONE	NONE	NONE	NONE	NONE

Working Policy to MASTER Policy Comparison Report

This report will compare the content in all Working Manual policies to the content in the Master Manual. It will simply display if the content matches or not. Content that does not match could be the result of customization by the credit union, updates to the master that have not been incorporated into the Working Manual, or a combination of both.

Working | Master | Archive

Search Working Manual: Search

- MANUAL ADMINISTRATION
  - EDIT SECTIONS OF WORKING MANUAL
  - MANUAL SECTION MANAGEMENT
  - MANUAL TOOLS
  - REPORTS
    - Key Fields Report
    - Working Manual Report
    - Working Policy to MASTER Policy Comparison Report
    - Policy Notes Report
  - Update This Menu Tree

Policy Comparison Report

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

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

Chapter/Policy

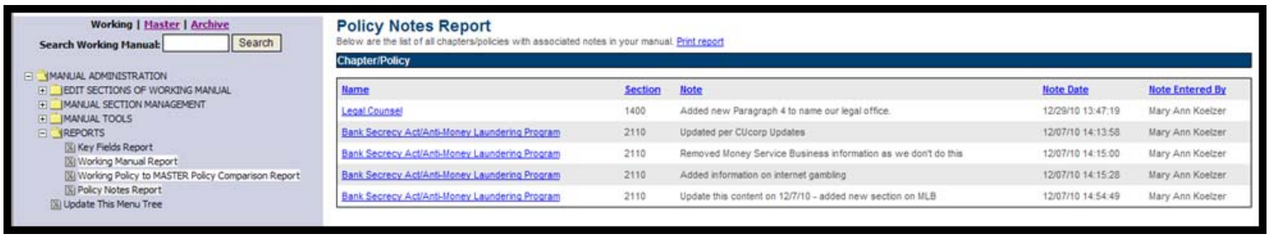
Name	Policy Number	Comparison Results	Exists in Master	Last Saved
Administrative	1000	Content Does Not Match, Title Matches	Yes	12/29/10
Leadership	1100	Content & Title Match	Yes	NONE
Leadership	1100	Content Does Not Match, Title Matches	Yes	12/08/10
Credit Union Values	1130	Content & Title Match	Yes	NONE
Credit Union History	1140	Content & Title Match	Yes	NONE
Field of Membership	1150	Content Does Not Match, Title Matches	Yes	12/08/10
Strategic Planning	1160	Content & Title Match	Yes	NONE
Equal Opportunity Statement	1170	Content & Title Match	Yes	NONE
Organization	1200	Content & Title Match	Yes	NONE
Compensation, Reimbursement And Indemnification	1210	Content & Title Match	Yes	NONE
Bond and Insurance Coverage	1220	Content & Title Match	Yes	NONE
Regulatory Compliance	1230	Content Does Not Match, Title Matches	Yes	NONE
Education & Volunteer Training Guidelines	1235	Content & Title Match	Yes	NONE
Audits	1300	Content & Title Match	Yes	NONE
Legal Counsel	1400	Content Does Not Match, Title Matches	Yes	12/29/10
Staffing	1500	Content & Title Match	Yes	NONE

Reports

Policy Notes Report

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

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



Manual Builder – The Master Manual

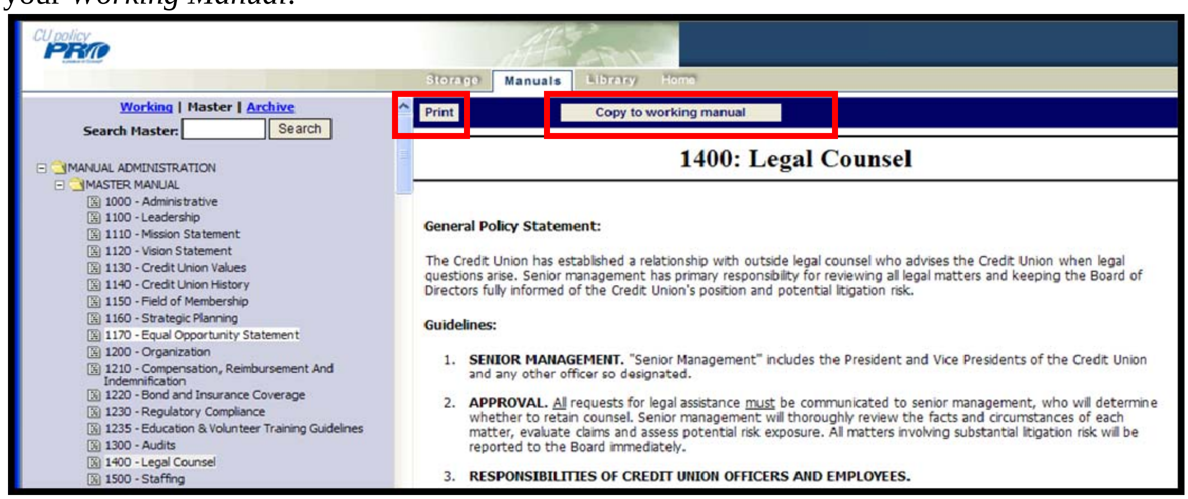
Accessing the Master Manual

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

As with the *Working Manual*, you will need to expand the “Manual Administration” folder.

Within the “Manual Administration” is the *Master Manual*. Open the *Master Manual* folder and all of the sections of the Master Manual are available. (Note: the working manual simply lists all of the policies and chapter headings. There are no folders separating the chapters as in the *Working Manual*)

Click on any section within the Master Manual and the full master text of that policy will appear on the right hand side of the screen. You can view and print the text, as well as copy this entire policy into your *Working Manual*.



Copying a Policy from the Master to the Working Manual

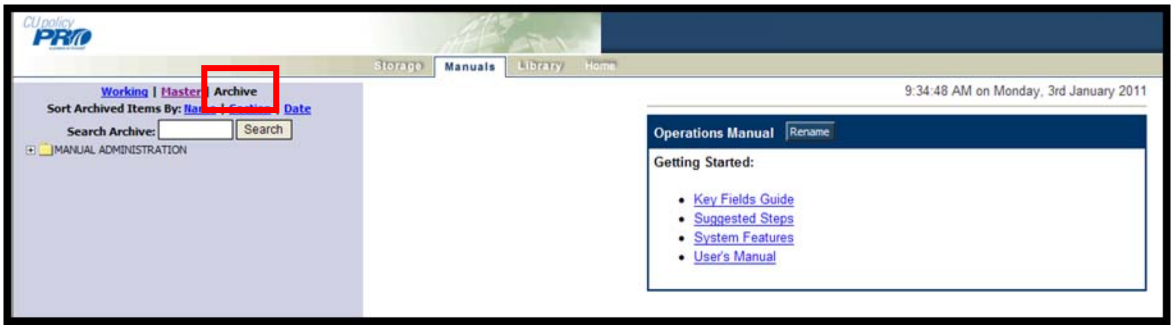
To copy a policy in its entirety to the *Working Manual*, simply open the policy within the *Master Manual*. Click the “Copy to Working Manual” button, and the policy is now added to your *Working Manual*.

Tip: If you are adding a new policy to your working manual, this is the only step necessary. If you are replacing an old policy in your Working Manual with an updated policy in the Master Manual, first remove the old policy from your Working Manual (see page 29), then bring in the updated policy. Bringing in the updated policy will not overwrite the old policy, but you will then have two policies (the old and the new) in your Working Manual.

Manual Builder – The Archive

Accessing the Archive

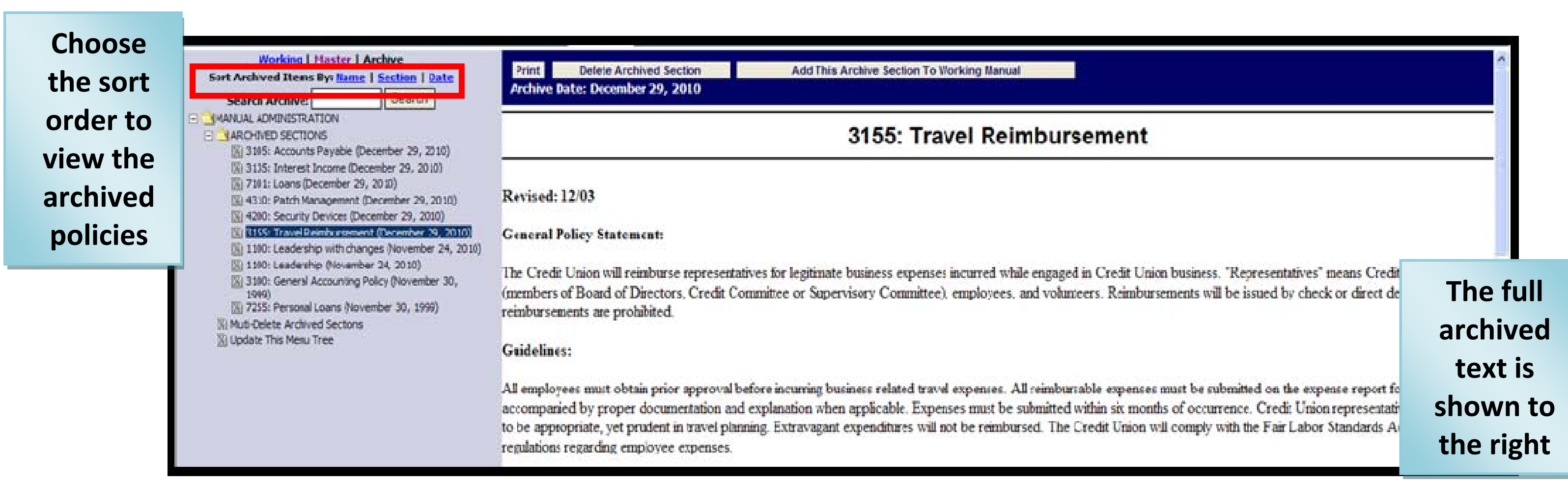
To access the *Archive*, click on the “Archive” link at the top of the Manual Builder area.



As with the *Working Manual* and *Master Manual*, you will need to expand the “Manual Administration” folder.

Within the “Manual Administration” is the *Archived Sections* folder. Open the *Archived Sections* folder and all archived policies are available. By default, the sort order is by date, with the most recently archived policies at the top of the list. You can change the sort order by clicking on the links directly below the link to the Archive, which allows sorting by Policy Number, Policy Name or Date.

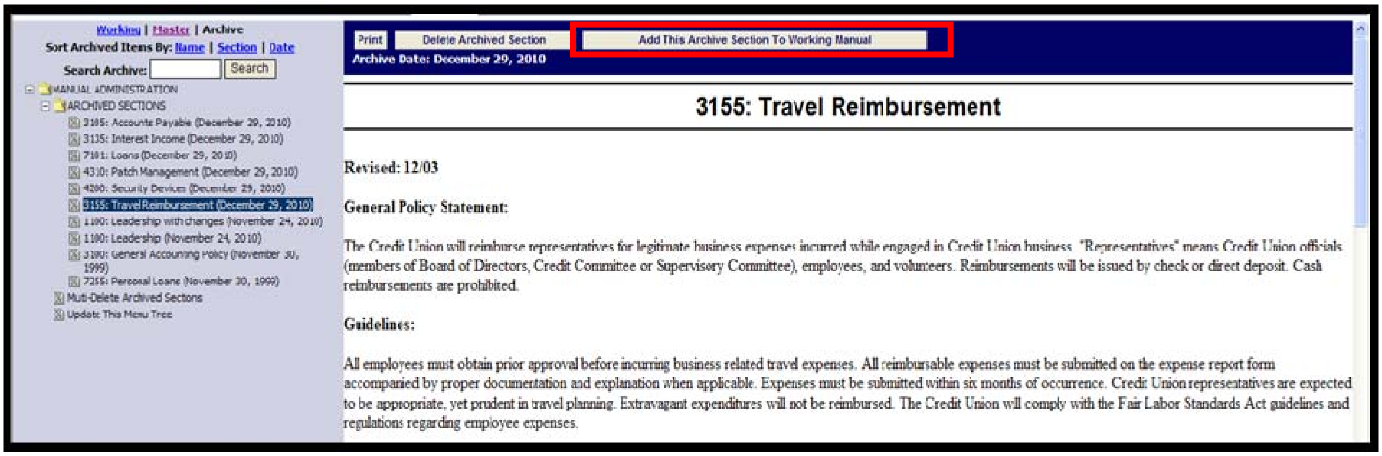
Click on any of the archived sections and the full text of that archived policy will appear on the right hand side of the screen. You can view and print the text, as well as delete the archived policy, or copy this entire policy back into your *Working Manual*.



Manual Builder – The Archive

Un-Archiving a Policy

To un-archive a policy, simply open the policy within the *Archive*.
Click the “Add This Archive to Working Manual” button, and the policy is now added back to your *Working Manual*.

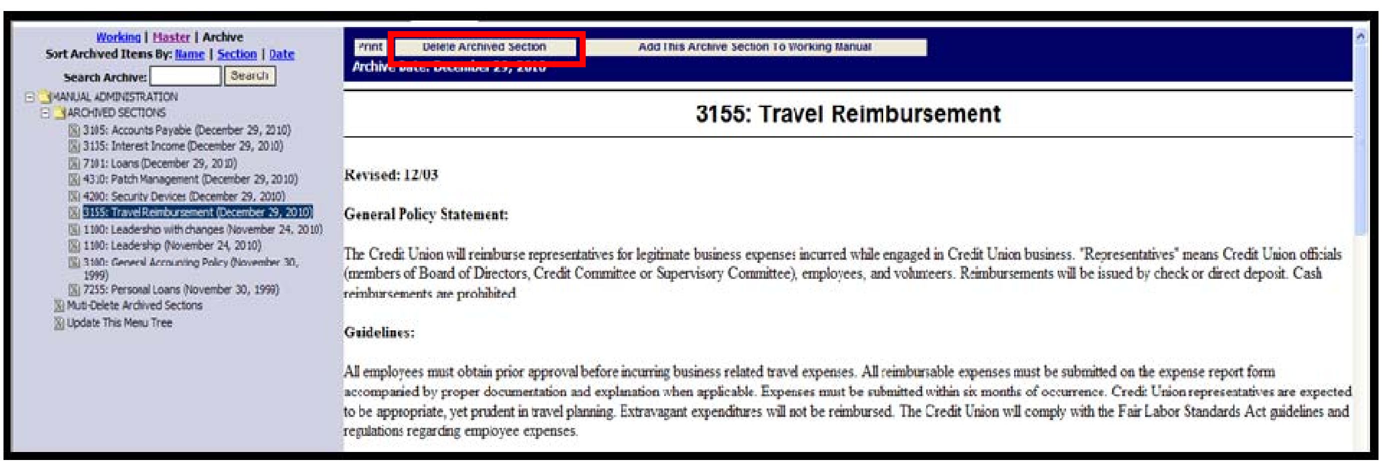


Tip: When un-archiving, be sure to first remove the unwanted policy version from your Working Manual (see page 29), then un-archive the proper version of the policy. Un-archiving a policy will not overwrite the policy in the *Working Manual*, but you will then have two policies (the correct and the incorrect) in your Working Manual.

Deleting Archived Policies

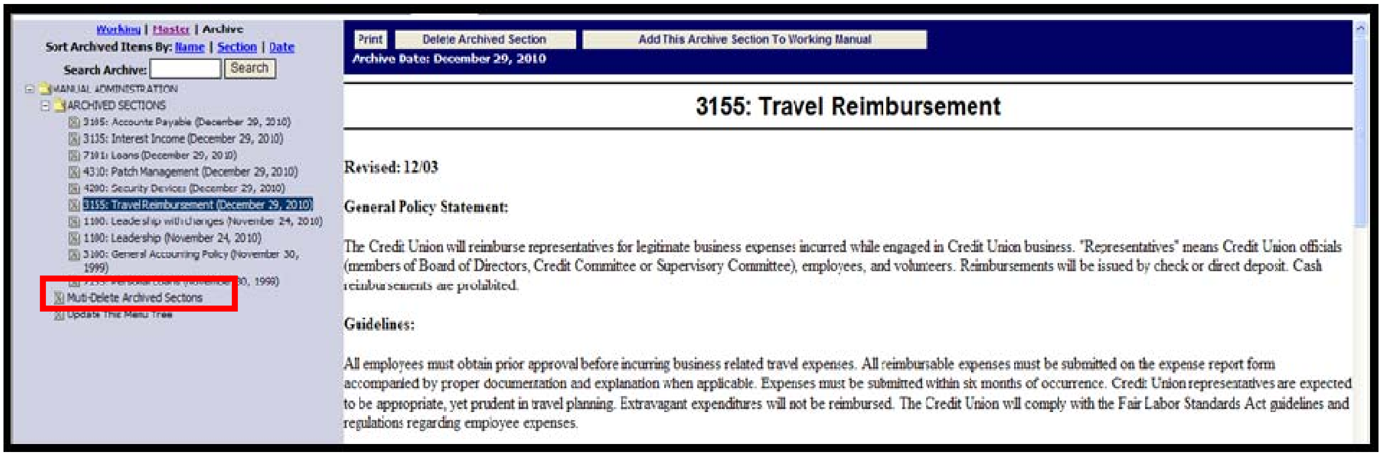
Policies can be deleted from the archive in one of two ways.

1. When viewing an archived policy, use the “Delete Archived Section” button to delete that particular section from the archive.

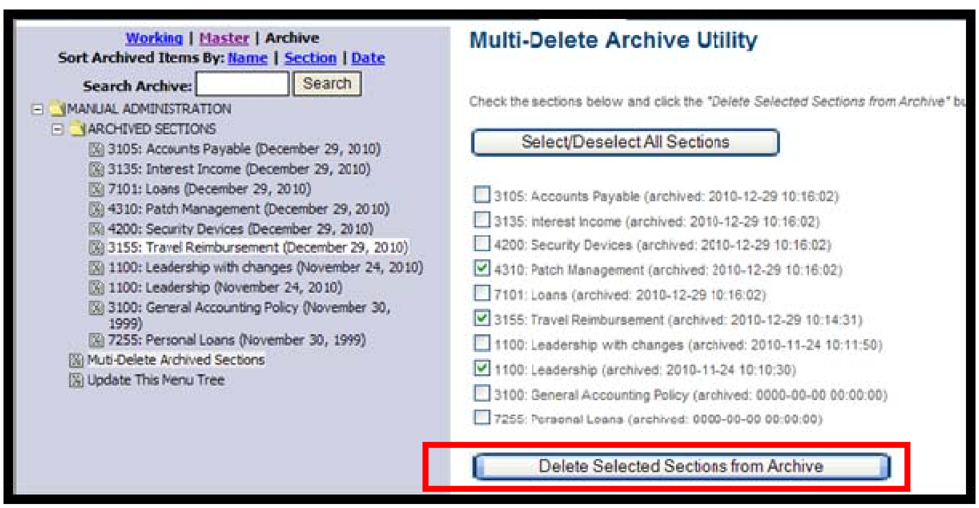


Deleting Archived Policies (continued)

2. Delete multiple sections from the archive at one time by clicking on the "Multi-Delete Archived Sections" link in the left navigation.

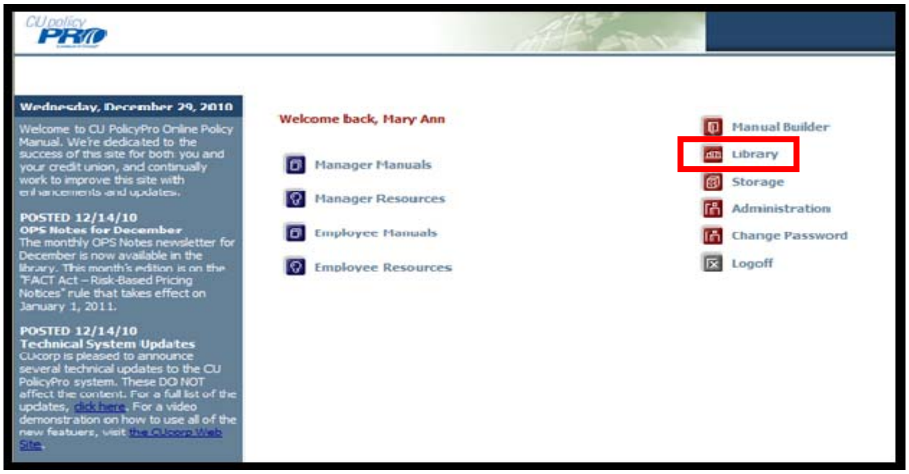


This will bring up a list of all sections within the archive.
Use the check boxes next to each archived policy to choose which policies should be deleted.
Click the "Delete Selected Sections from Archive" button.



Library

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



The Library is divided into four sections:

1. **Notes**. All of the past monthly *OPS Notes* newsletters are stored in this tab. As part of your annual fee, you have unrestricted access to each of them.

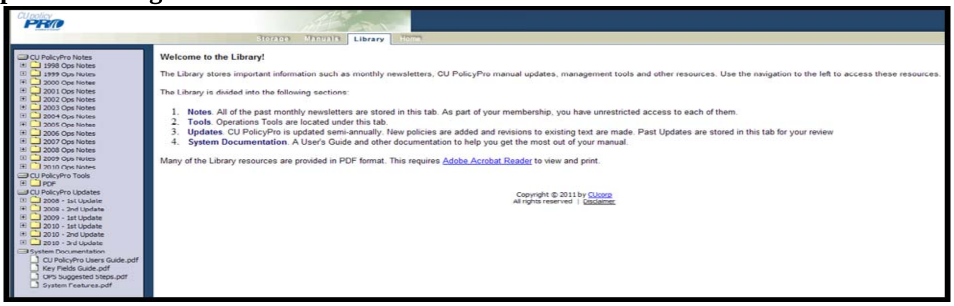
2. **Updates.** CU PolicyPro is updated semi-annually. New policies are added and revisions to existing text are made. Past Updates are stored in this tab for your review. Older updates are periodically purged from the *Updates* tab.

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

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

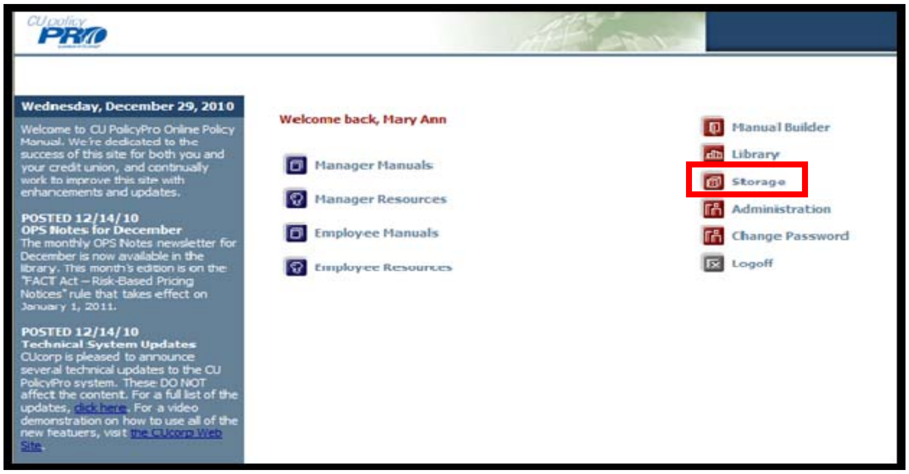
To access any of the items in the *Library*, simply click on the name of the folder (or the plus/minus sign to the left of the folder), and click on the item you want to view. The item will open in a new window.

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



Storage

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

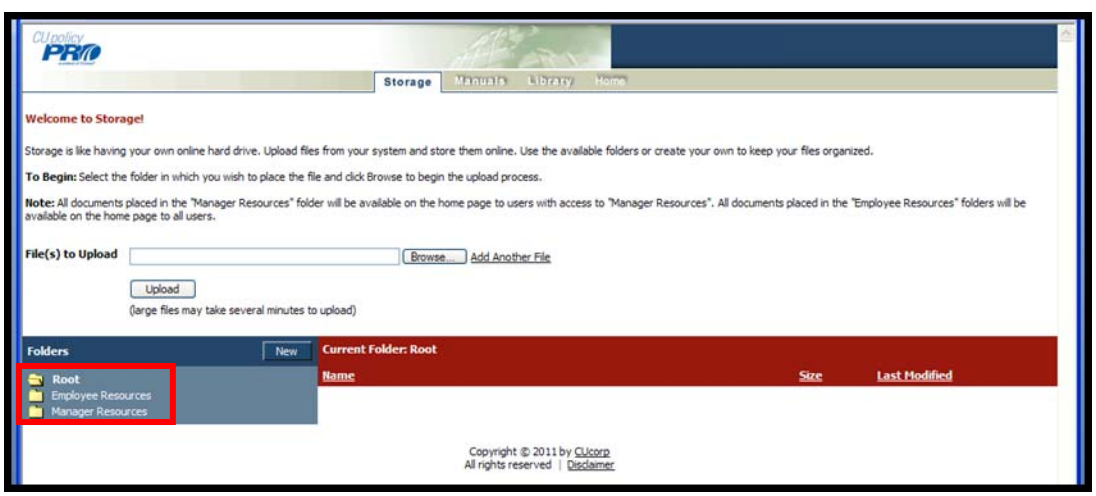


The Storage area allows you to upload and store documents. Once in storage, document can be posted to the Home Page, either in the "Manager Resources" or "Employee Resources" folder.

Many credit unions also upload working documents so they can continue to work on their manual from remote locations, such as their home, or another branch location, where the documents on their computer or network will not be available.

<u>Storage File Structure</u>

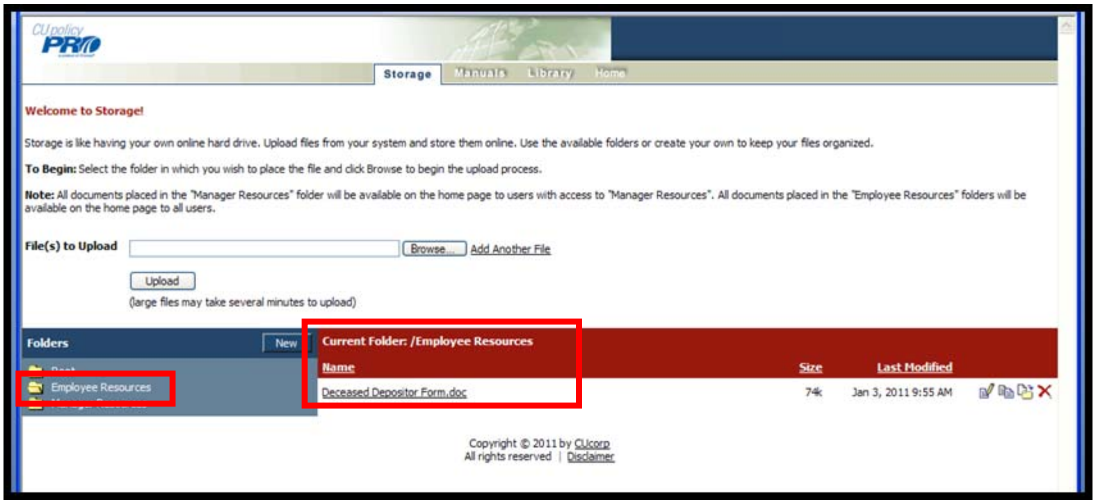
By default, the Storage area contains three folders: "Root", "Employee Resources", and "Manager Resources".



Storage

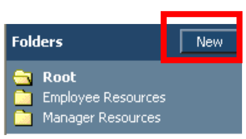
<u>Storage File Structure (continued)</u>

Clicking on the folder name and the contents of that folder will be displayed in the center section of the screen.



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.

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



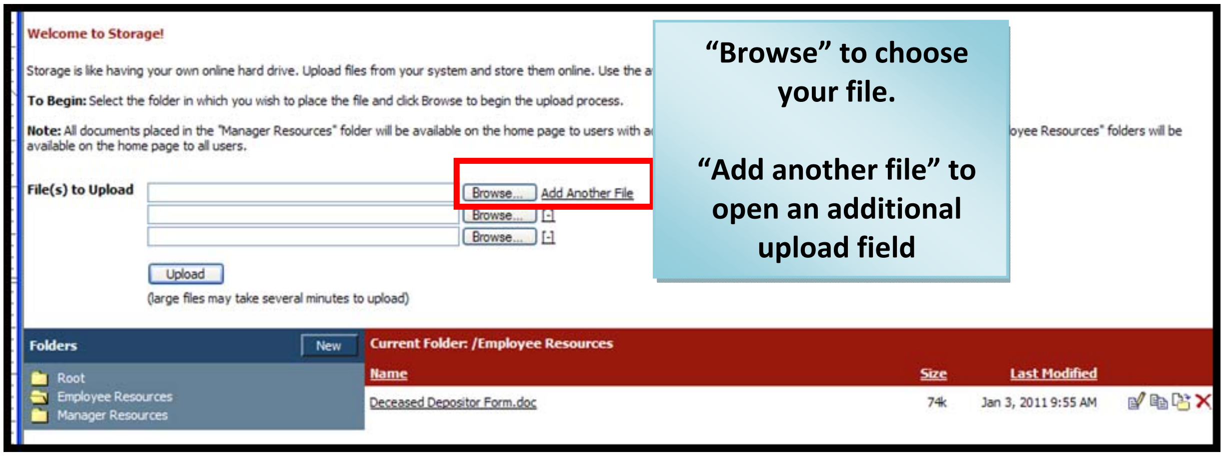
Storage

Uploading Files to Storage

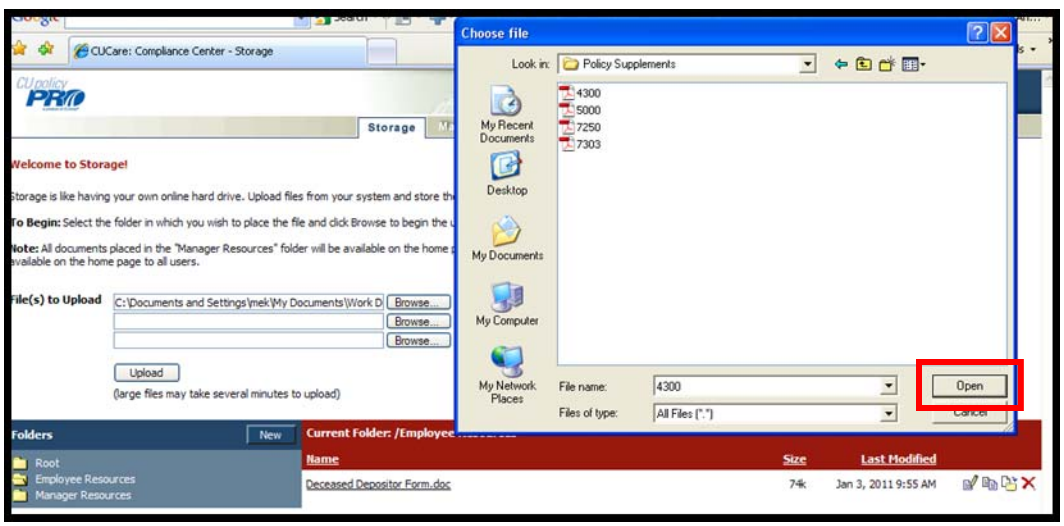
Choose the folder to which you want to upload your document.

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

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



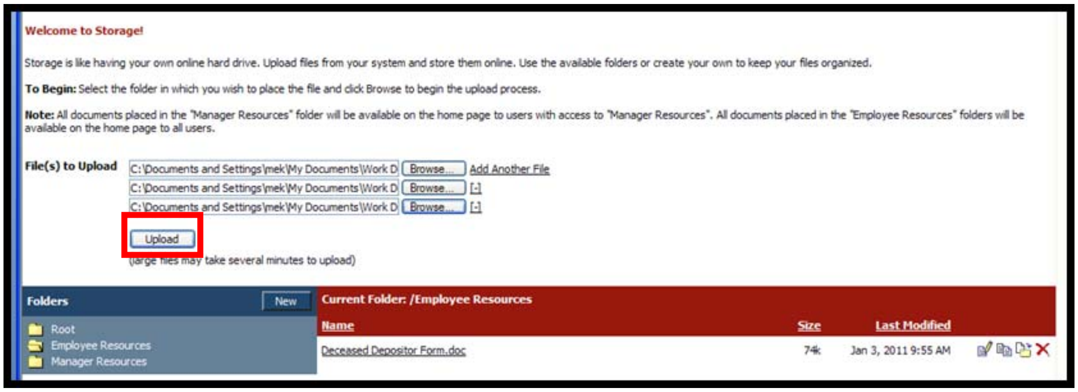
Once you’ve found the file, to upload, click on the file name, then click the “Open” button on the dialogue box.



Storage

Uploading Files to Storage (continued)

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

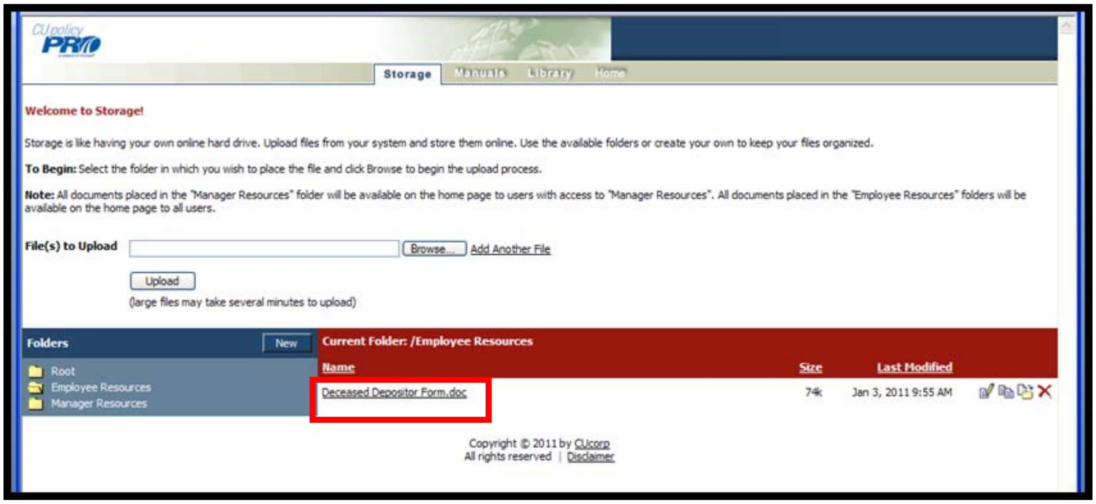


Note: The Storage area supports the upload of multiple file types, such as Microsoft Office, Text, PDF, etc. However, when opening files, the computer you are working on must have that program available in order to access the file. This can sometimes be an issue when opening the file from a remote location.

Storage

Opening files in Storage

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



Making Changes to Files in Storage

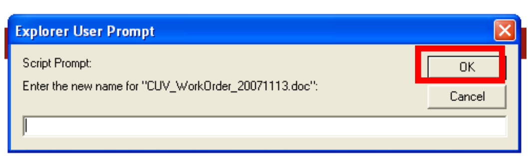
If any changes are made to the file after it is opened, the file must first be saved locally, then the updated document re-uploaded to *Storage*.

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

Renaming Files in Storage

To rename a file, click on the "rename" icon to the far right of the file name.

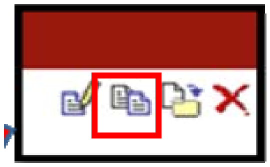
A dialogue box will open to allow you to rename the file. Enter the new name and click "OK".



Storage

<u>Copying files in Storage</u>

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

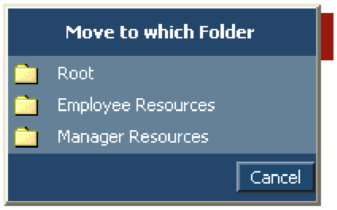


This will create a copy of the file, named “Copy of (file name)”. You can then rename or move this file, if desired.

<u>Moving files between folders in Storage</u>

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

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.



Storage

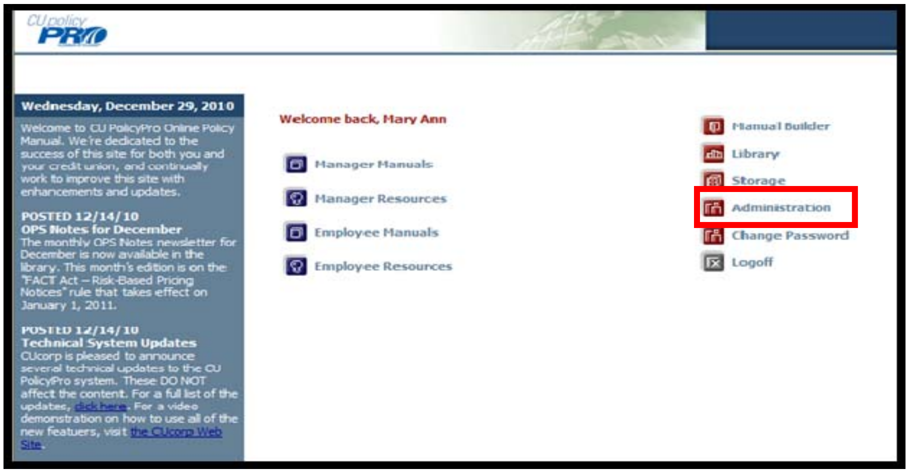
<u>Deleting files in Storage</u>

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

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

Administration

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



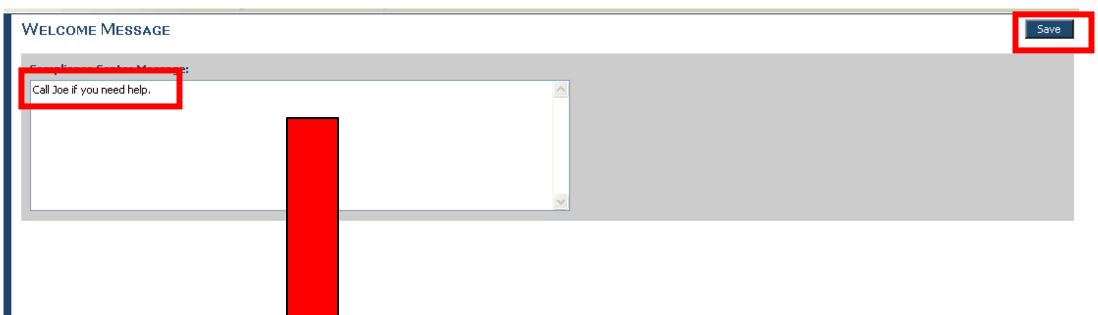
The *Administration* Area allows you to manage several functions, including the managing users, adding a Welcome Message to the *Home* Page, adding a disclosure to your published manual, uploading your logo, and viewing your license and subscription information.

Administration

Adding a Welcome Message to the Home Page

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

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



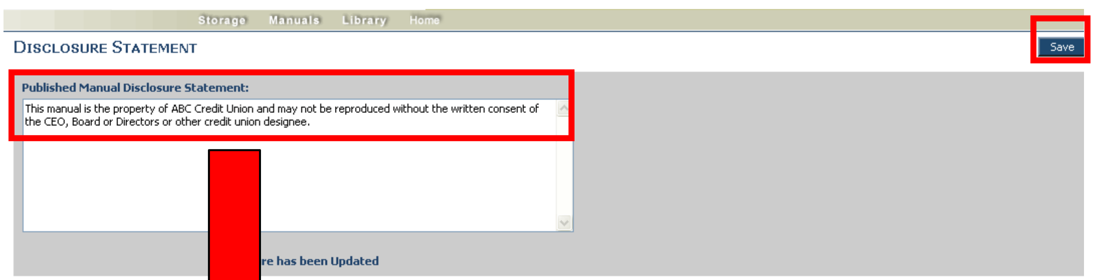
This message will now appear on the Home Page

Administration

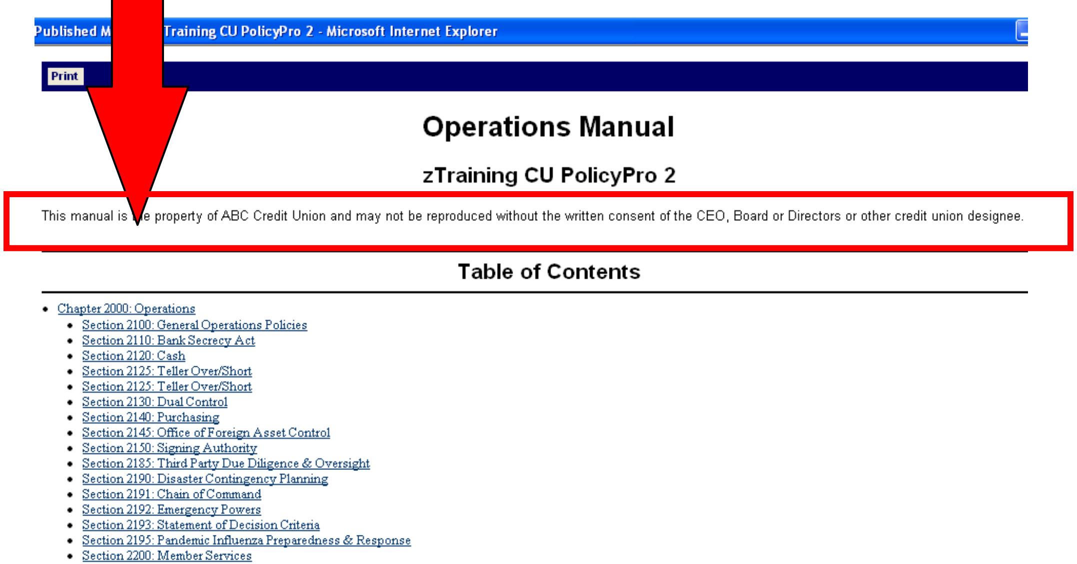
Adding a Disclosure to the Published Manual

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

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



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

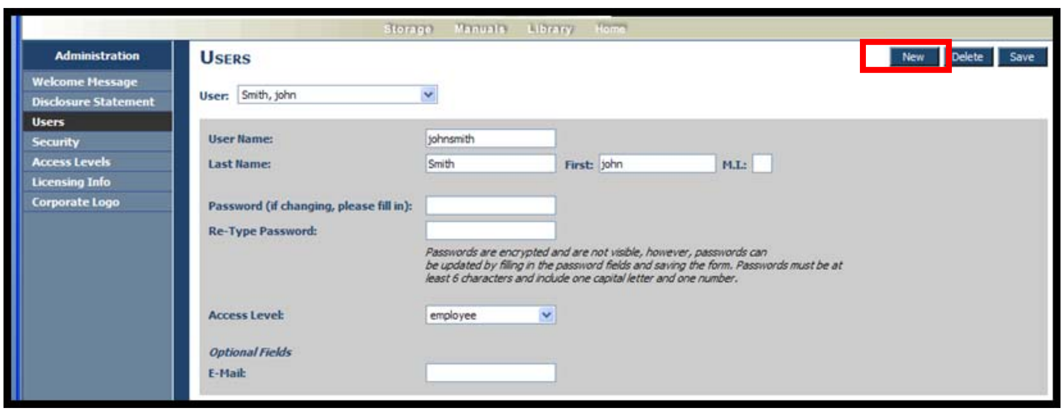


Administration

Adding New Users

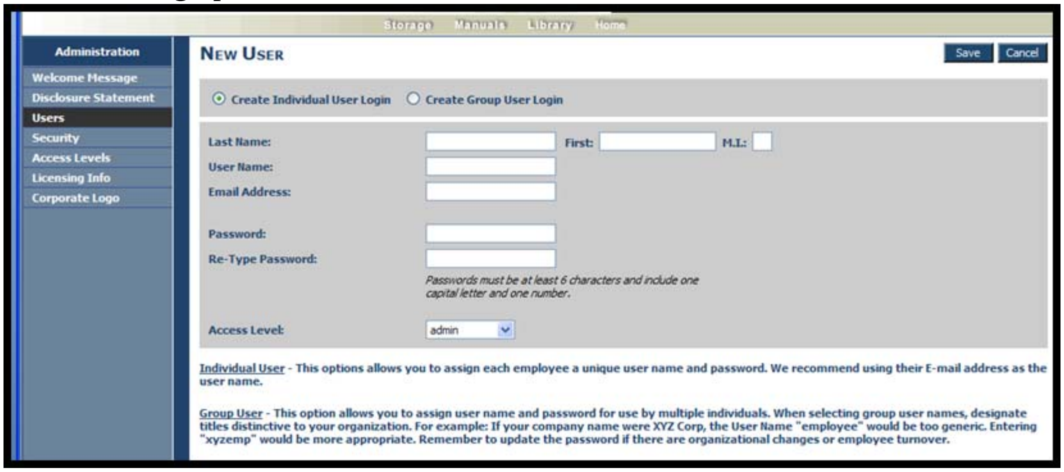
Click on the “Users” button on the left navigation.

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



Adding New Users (continued)

This will bring up the “New User” form.

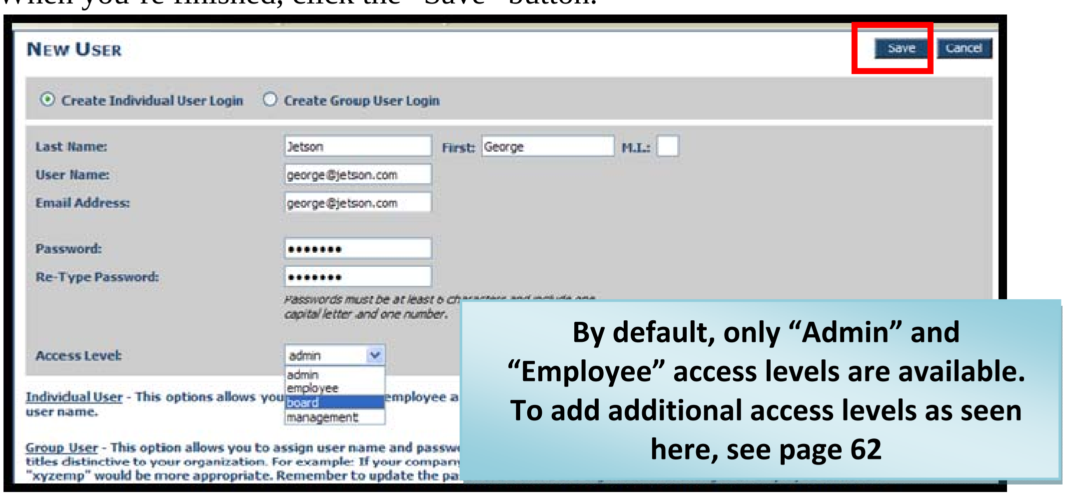


Two types of users can be created: Individual or Group Users.

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)

For either an Individual or Group User, type in the First and Last Name (or Group Name for Group Users), the User ID, Email address, and Password. (Passwords are encrypted and must be entered in twice for security reasons).
From the dropdown list, choose the Access Level this user will have.

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



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

Administration

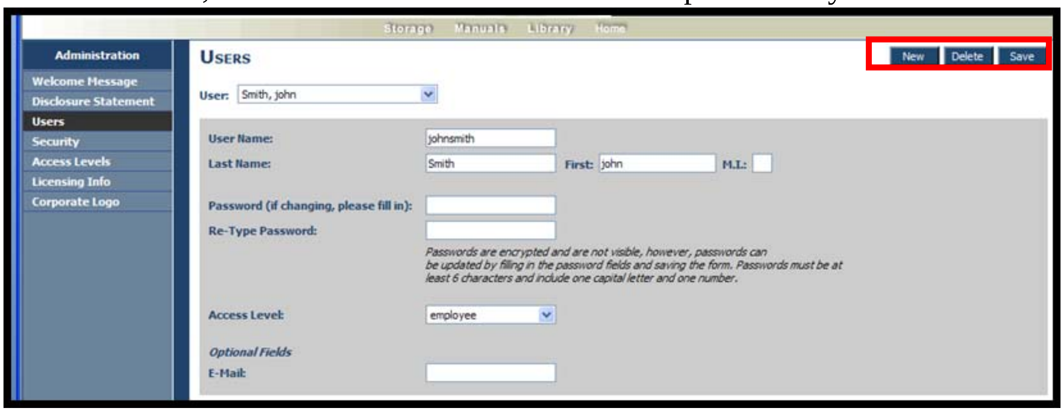
Editing or Deleting Users

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

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

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

To delete a user, click the “Delete” button. This will permanently delete this user.



Administration

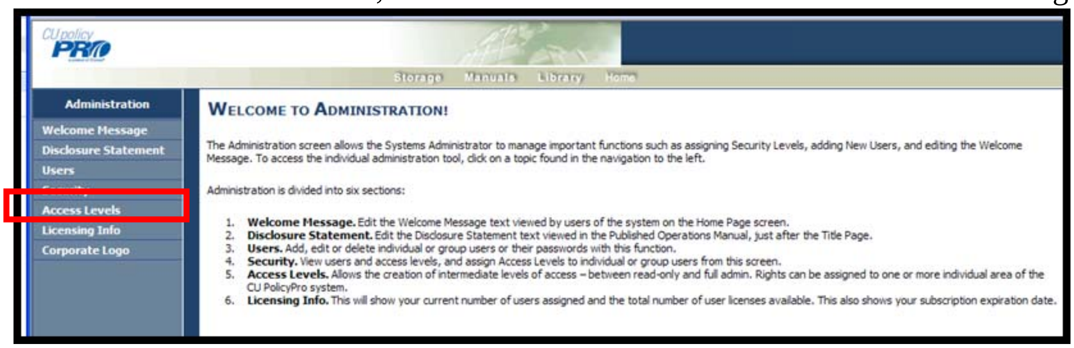
Adding/Editing Additional User Access Levels

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

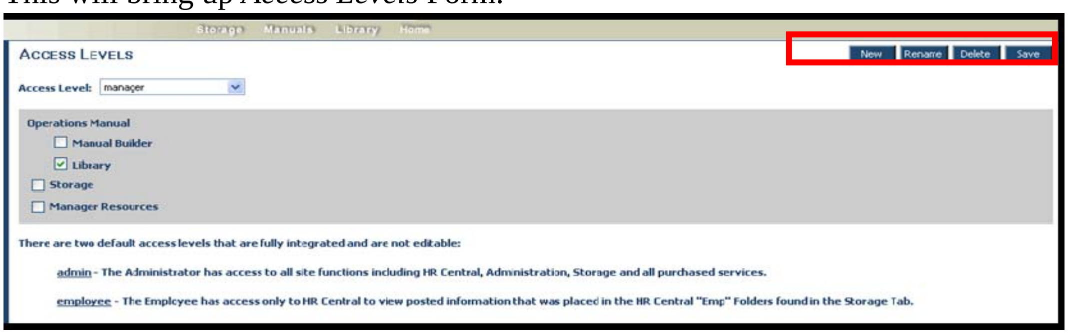
Admin level access gives the user full access to perform any function in the system. *Admin* is the only level of access that allows a user to access the *Administration* area.

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 Logoff) will be available to an *Employee* level user.

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



This will bring up *Access Levels* Form.



Click “New” to create a new access level. You will be asked to name the access level.

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

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

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

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

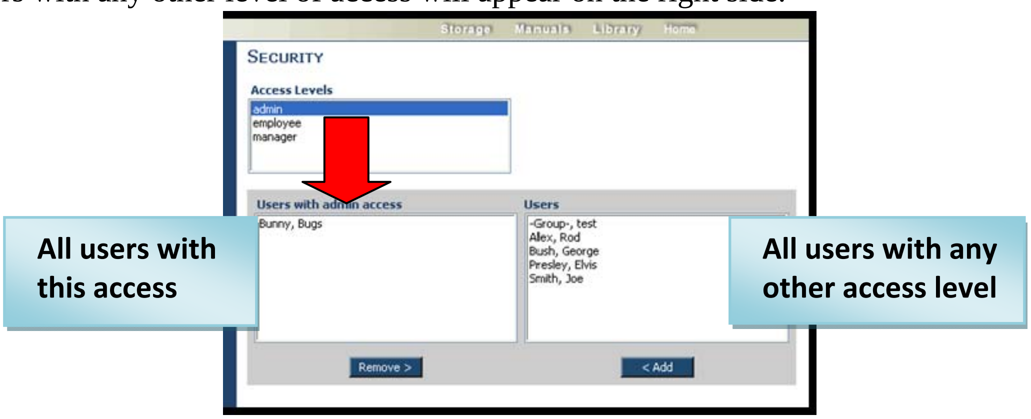
Administration

Viewing/Editing Multiple Users at Once

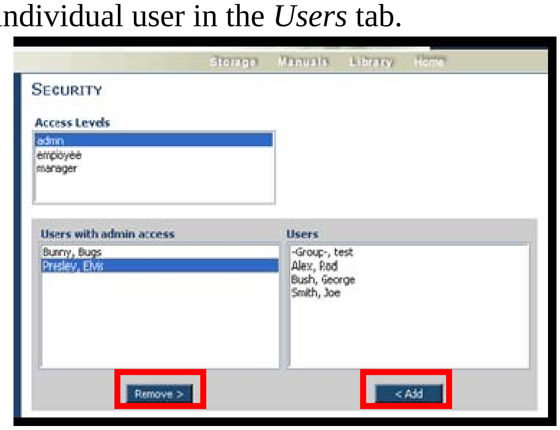
Use the “Security” tab to view all quickly user levels and user IDs, and to quickly change the user access level for multiple users at one time.

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

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



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



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

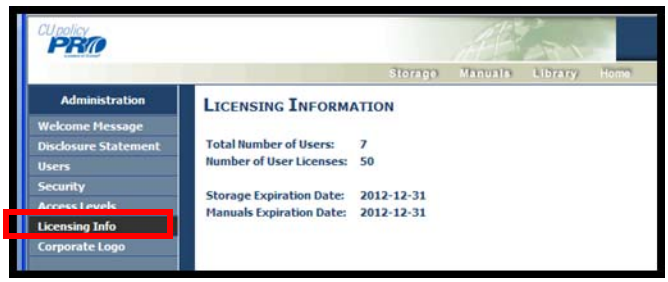
Administration

Viewing License and Subscription Information

To view your licence and subscription information, click on the “Licensing Info ” button on the left navigation.

This will display the number of users you currently have set up, and the total number available. By default, each credit union receives 50 user licenses.

This will also display your subscription expiration date.



Corporate Logo

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

Click on the “Corporate Logo” button n the left navigation.

Use the “Browse” button to upload your logo. Your current logo will show below the “browse” field.

To replace a current logo, simply use the “Browse” button to upload the updated logo, which will replace any logo currently in the system.

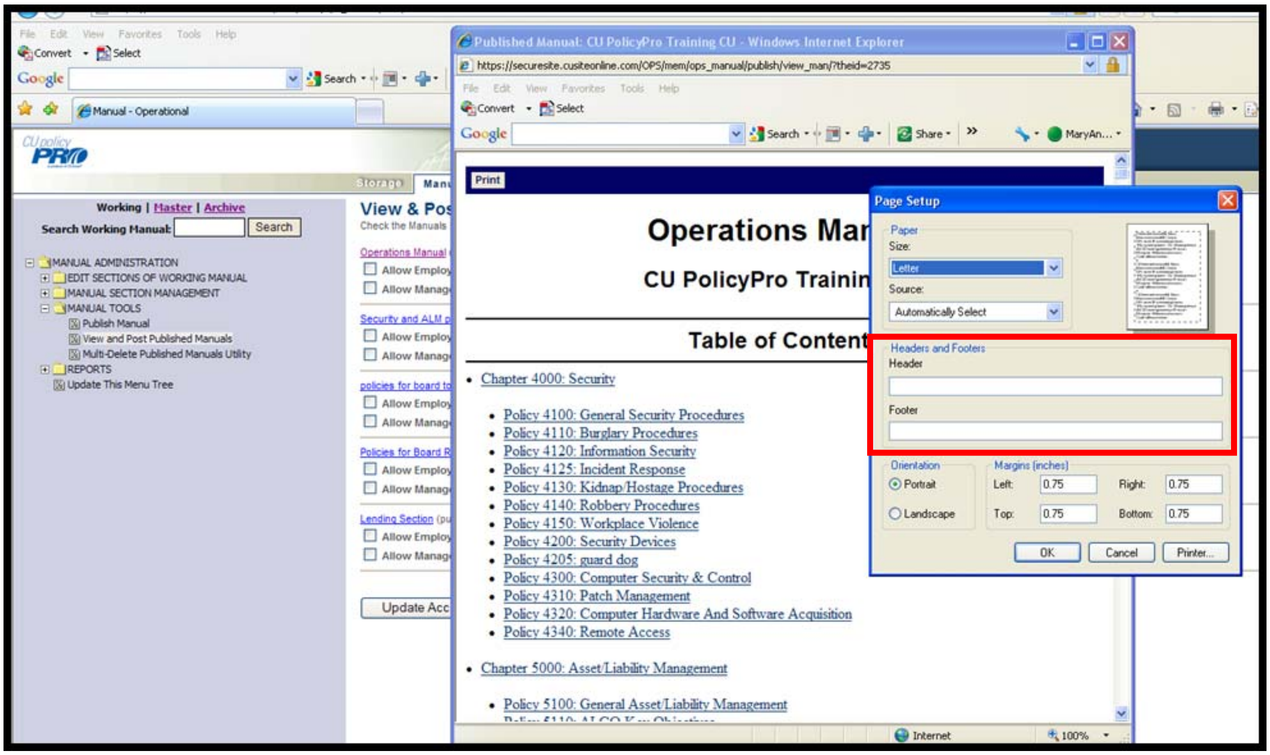
Appendix A – Printing Tips

<u>Printing Tip #1: Header and Footer</u>
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.
It is recommended to remove everything from the "Header" field, and either removing everything from the "Footer" field, or, if you want the page numbers to print, enter the code "&p of &P".   This will print in the footer the format "Page X of Y".

See Appendix B for more header and footer codes.



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.

<u>Tip #2: Printing a Page Range</u>
Because this is an HTML document, the page numbers will not display until you have printed.   To print a specific page range, use the "Print Preview" function to determine the page range you want to print.

To do this:
Open your published manual.
From the File Navigation menu, choose "File", then "Print Preview" The "Print Preview" will allow you to view all the pages

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