



USER'S GUIDE

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Getting Started

Before your Disaster Recovery Manual can be printed and distributed, it must first be customized for your credit union. In its initial form, the Manual provides the framework for you to build your plan.

In many of the sections, sample text is provided to use as a starting point - reading through these sections, you can decide if the text works for your credit union, or if you need to customize it for your own needs. In other areas, guidance is provided on what type of information you need to enter in that particular section. Certain sections may not pertain to your credit union and can be deleted (ie. If you do not live in a hurricane-prone area you don't need to plan for a hurricane occurring).

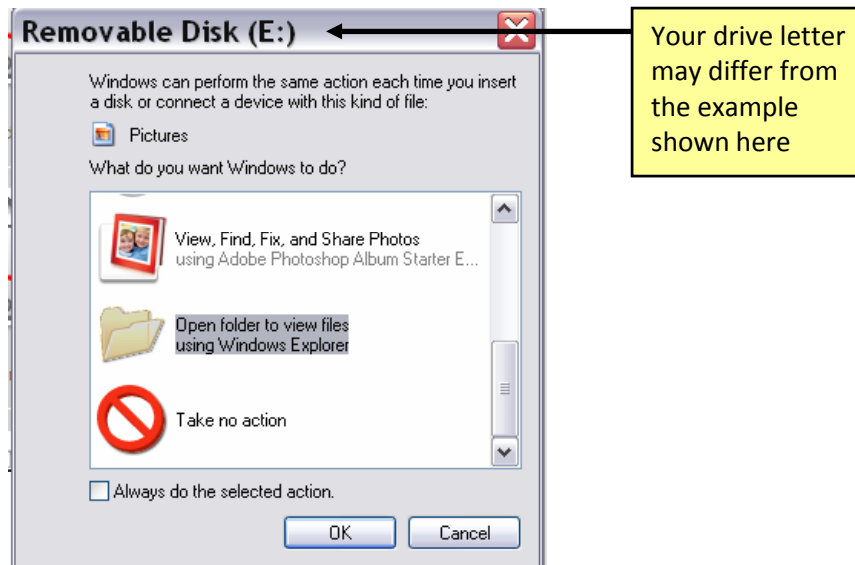
The Library of RecoveryPro contains several documents that can also help get you started. These are found in the TOOLS folder. More information on these documents is found in Appendix A.

This User's Guide will walk you through the technical aspects of how to use RecoveryPro so you can use the system to build and customize your plan.

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

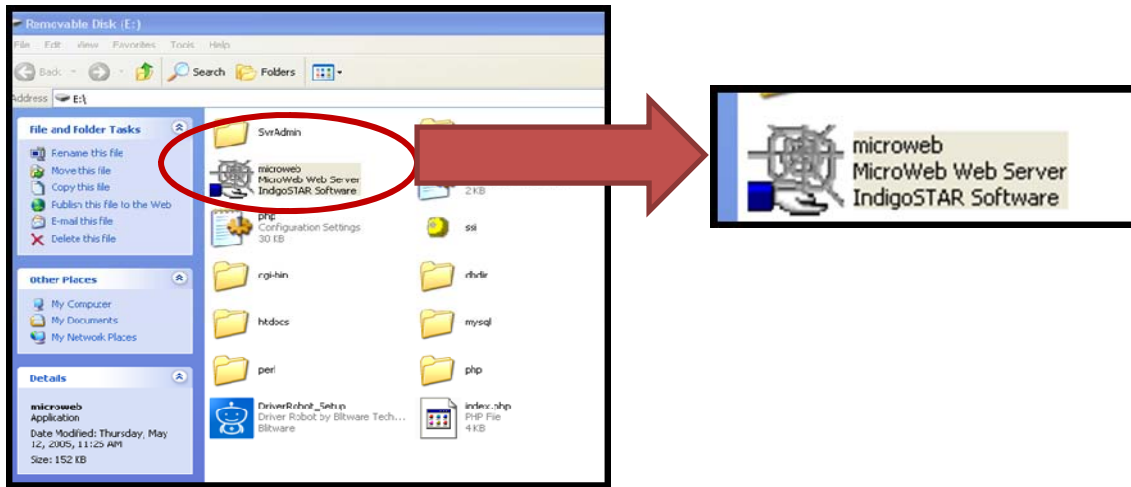
Logging In With the Flash Drive

1. Insert the Flash Drive into your USB Port. USB Ports are generally found on the front or back of your PC. Some PCs may have a USB port on the keyboard. If you are having difficulty locating your USB port, please contact your IS Department.
2. Once the Flash Drive hardware is detected, a Windows prompt will appear on your computer. Note: this may take a few moments. Please be patient.
3. Scroll down until you find the “Open Folder to View files using Windows Explorer Option”. **Double click on this option.**

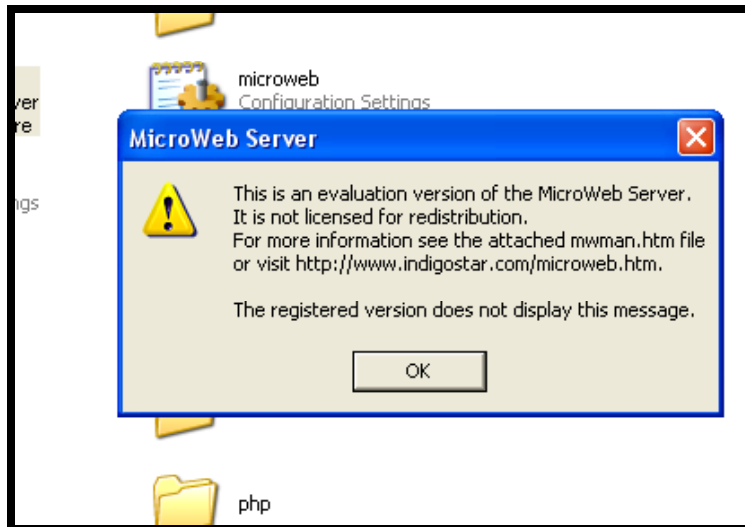


Logging In With the Flash Drive (continued)

- Once the Explorer window has opened, double click on the microweb.exe option



- A message will appear letting you know this is not for redistribution. Please click OK.



Logging In With the Flash Drive (continued)

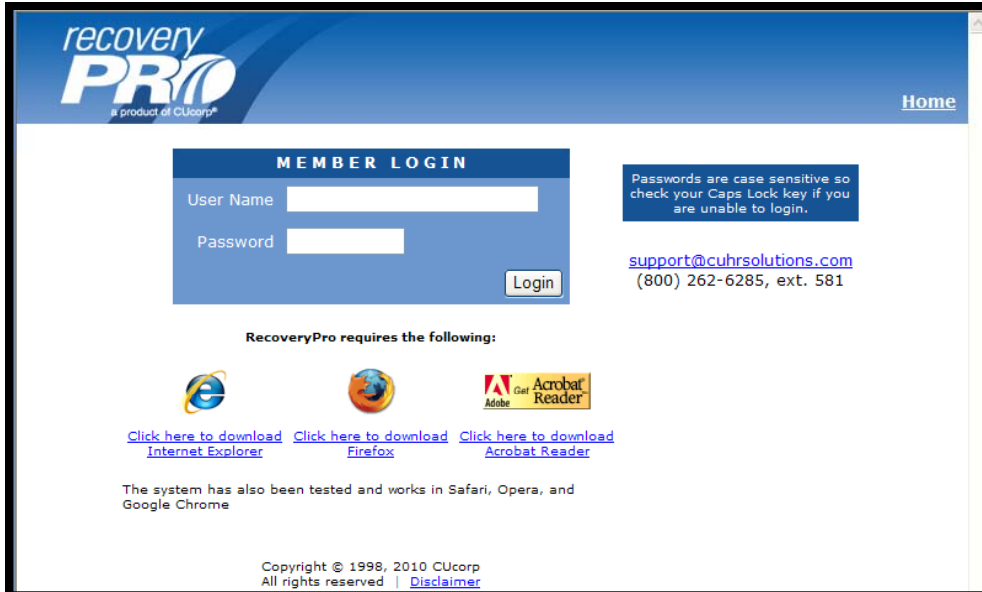
- If this is the first time the flash drive has been used, you will be prompted to enter the registration key information.



The screenshot shows the 'recovery PRO' logo at the top left, with 'a product of CUcorp' underneath. A 'Home' link is at the top right. The main text reads: 'This application requires registration of product before it can be used. Please fill in the product registration information you received below. This requires a live connection to the Internet. If you need assistance, please contact 800-262-6285 x581 or support@cuhrsolutions.com'. Below this is a 'PRODUCT REGISTRATION' form with three input fields: 'License Key', 'Company', and 'Your Name'. A 'Register DR Product' button is at the bottom of the form. At the very bottom, it says 'Copyright © 1998, 2010 by CUcorp. All rights reserved | [Disclaimer](#)'.

Note: This screen will only appear if the flash drive has not yet been registered. Once it is registered, you will always go immediately to the login screen.

- Once the flash drive has been registered, you will be prompted to login and can begin working on your manual.



The screenshot shows the 'recovery PRO' logo at the top left, with 'a product of CUcorp' underneath. A 'Home' link is at the top right. The main heading is 'MEMBER LOGIN'. There are two input fields: 'User Name' and 'Password'. A 'Login' button is at the bottom right of the form. To the right of the form is a blue box with white text: 'Passwords are case sensitive so check your Caps Lock key if you are unable to login.' Below this is the email address support@cuhrsolutions.com and the phone number '(800) 262-6285, ext. 581'. Below the login form, it says 'RecoveryPro requires the following:' followed by three icons: Internet Explorer, Firefox, and Adobe Acrobat Reader. Below the icons are three links: '[Click here to download Internet Explorer](#)', '[Click here to download Firefox](#)', and '[Click here to download Acrobat Reader](#)'. Below these links, it says 'The system has also been tested and works in Safari, Opera, and Google Chrome'. At the very bottom, it says 'Copyright © 1998, 2010 CUcorp. All rights reserved | [Disclaimer](#)'.

The Home Page

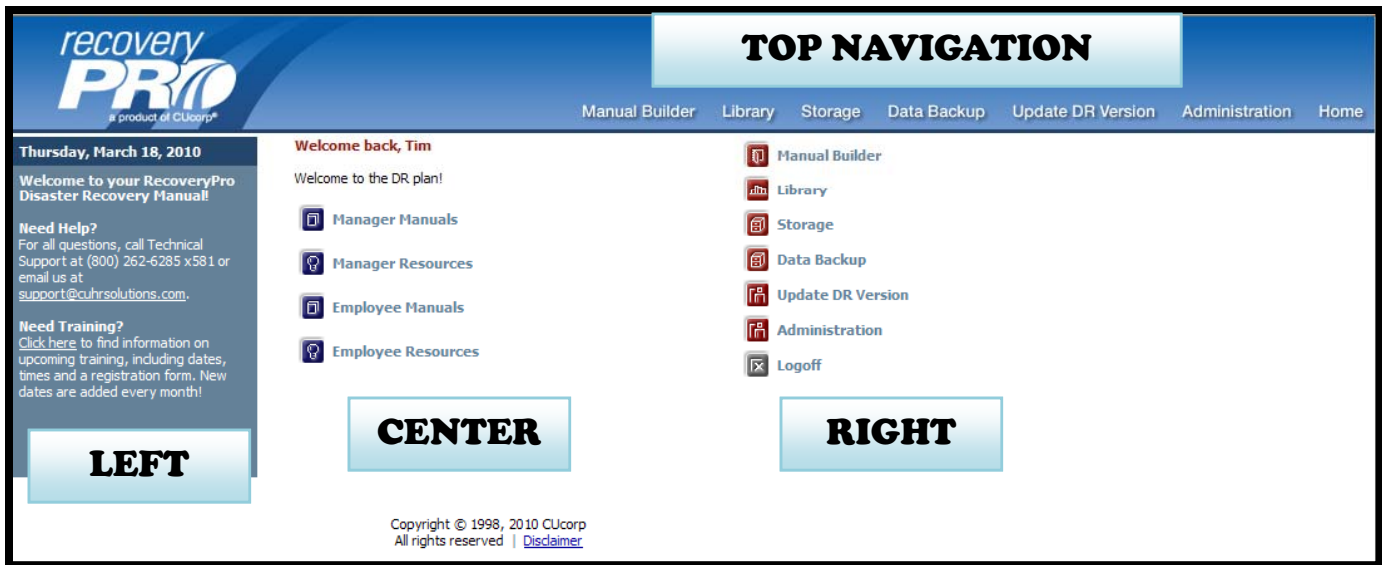
Once logged in, you will see The Home Page

The **left side** of the screen provides contact information, and a link to the CUcorp website for upcoming training sessions.

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. “Employee Resources” and “Employee Manuals” are available “Employee” level users.

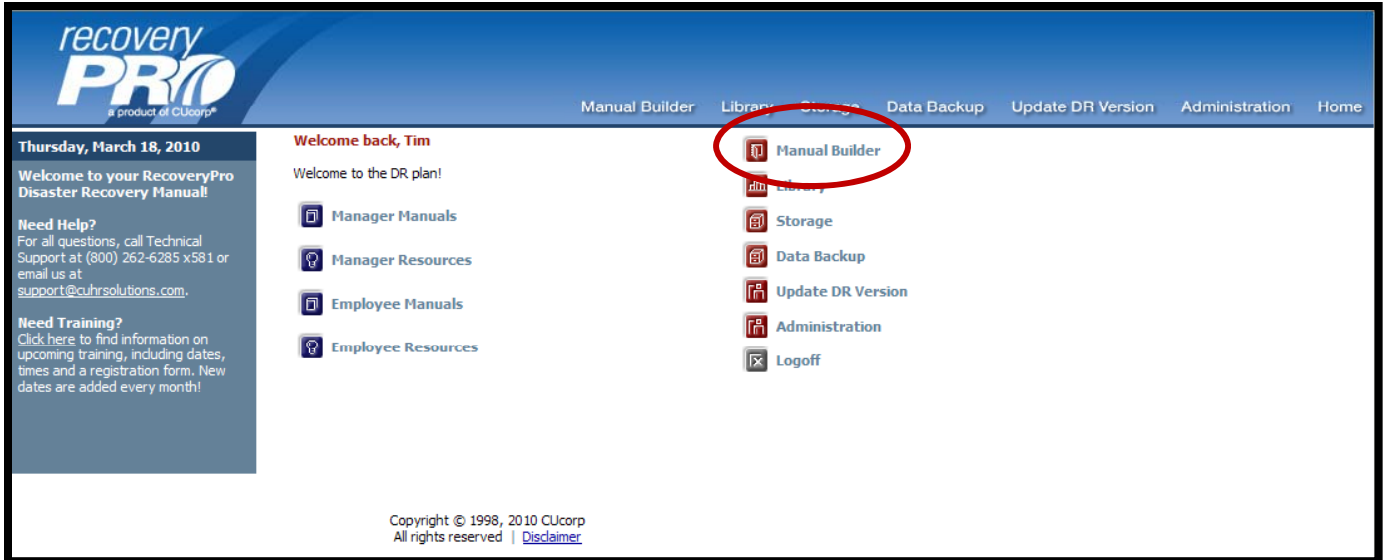
The **right side** of the screen has the navigation menu to access the various areas of the site. Only users with Admin access will see these options.

The **top navigation** also provides the navigation menu to access the various areas of the site. This is available throughout RecoveryPro.



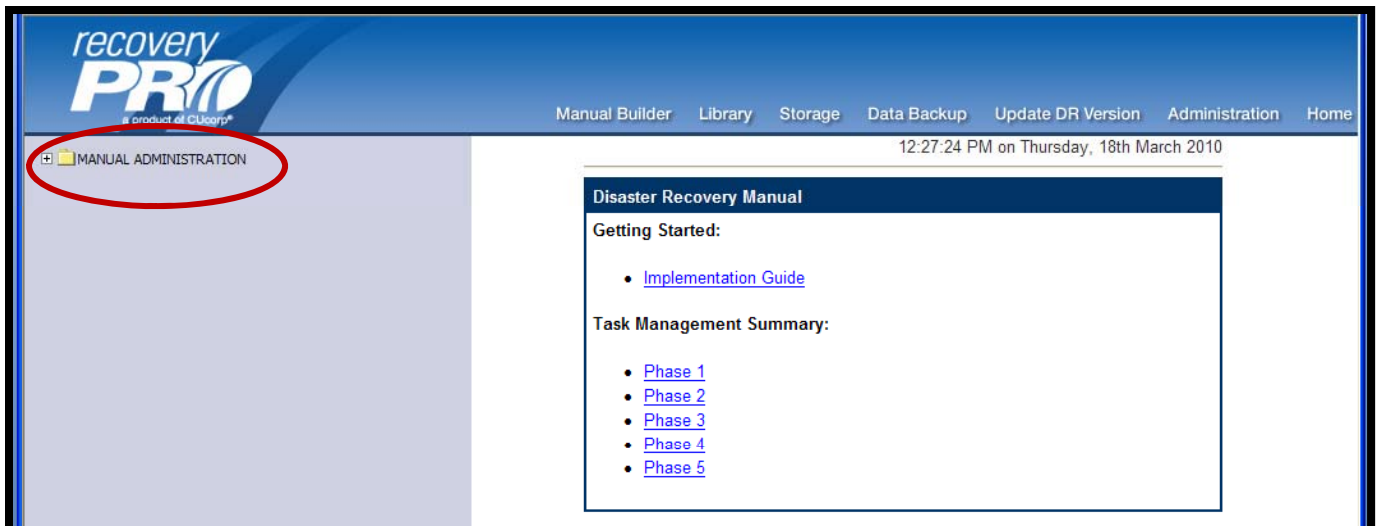
Manual Builder – Opening Your Manual

Click on “Manual Builder” in the right hand navigation to access your RecoveryPro Disaster Recovery 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.



Manual Builder – Navigation

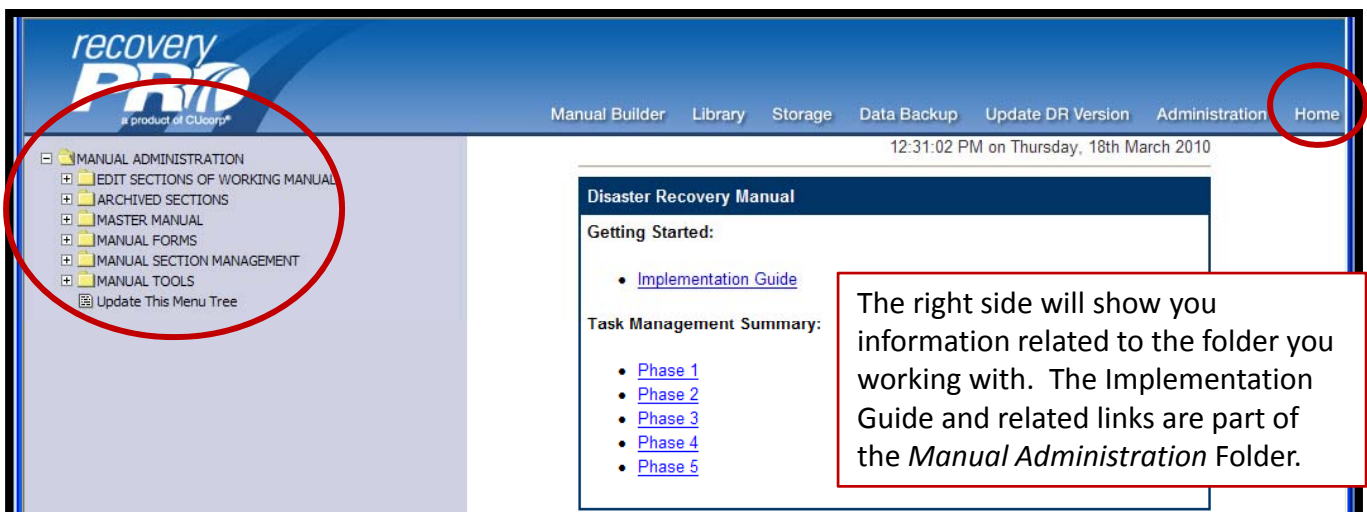
The right hand side of the screen will display any information related to the folder you are working with. When you first enter the *Manual Builder* area, some resources for Getting Started are available. As you move through the folders contained within *Manual Administration*, the information on the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

Navigation to other areas of RecoveryPro is available at the top of the screen. Clicking on the “Home” button will return you to the Home Page.

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.

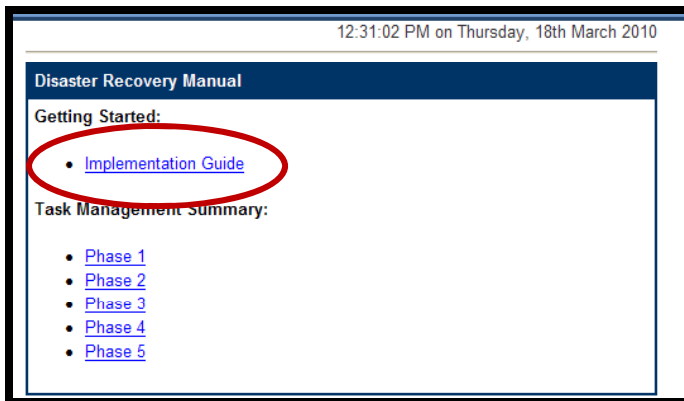


The screenshot shows the RecoveryPro Manual Builder interface. The top navigation bar includes links for Manual Builder, Library, Storage, Data Backup, Update DR Version, Administration, and Home. The left sidebar displays a tree view of folders under 'MANUAL ADMINISTRATION', with the folder expanded. The main content area displays the 'Disaster Recovery Manual' page, including 'Getting Started' and 'Task Management Summary' sections. A red circle highlights the 'Home' button in the top navigation bar. A red box highlights the content area, and a text box explains that the right side shows information related to the folder you are working with.

The right side will show you information related to the folder you are working with. The Implementation Guide and related links are part of the *Manual Administration* Folder.

Manual Builder – The Implementation Guide

Click on the “Implementation Guide” link on the right hand side of the Screen to open the Implementation Guide. (Note: a printable version is available in the Library area under the TOOLS section. More information about this Guide can be found in Appendix A)



This document guides you through each of the phases of developing your plan.

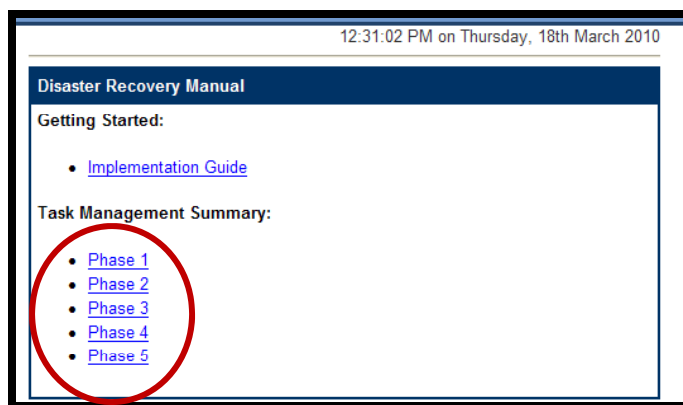
This block contains a collage of overlapping document pages. The pages include:

- PHASE I: CONTINGENCY PLAN FOUNDATION I-1** with a "Task Management Summary" link.
- CHAPTER 1: Introduction** with links for "Are You A Believer?", "This Is Real", "Fiduciary Duty", "NCUA Requirement", "The Bottom Line", "The Disaster Planning...", "The Disaster Planning...", "Integrating Software and...", and "A Practical Approach To...".
- CHAPTER 2: Define the Scope**
- NCUA REQUIREMENT** with a "Top of Page" link. Text includes: "The second reason is the regulatory requirement set down by the National contingency plan written and recently reaffirmed in NCUA L...".
- THE BOTTOM LINE** with a "Top of" link. Text includes: "So here is the bottom line: Yo tied to your level of commitme".
- THE DISASTER PLANNING PR**
- SYSTEM RECOVERY PROCEDURES** with a "Top of Page" link. Text includes: "The first set of documentation we will discuss are your system recovery procedures competent, yet unfamiliar with your system, to get the system back on-line (for exam the system day-to-day). Evaluate all of the systems in your credit union to identify which ones require a dist At a minimum, the following procedures will be required:"
- A numbered list of recovery procedures:
 - (1) Mainframe System Recovery
 - (2) Desktop System Recovery
 - (3) Network Recovery
 - (4) Telephone System Recovery
 - (5) Security System Recovery

Manual Builder – The Implementation Guide (cont)

The beginning of each chapter of the Implementation Guide contains a Task Management Summary, , which is a checklist of what needs to be completed in order to complete that phase.

A quick link to each of the Task Management Summaries for each phase is available with the Getting Started documentation,



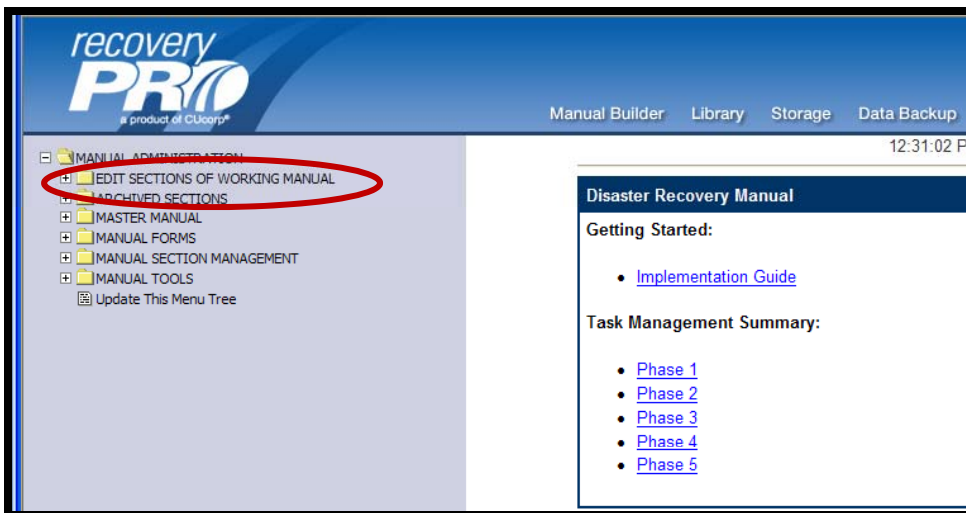
Use the Task Management summary to list who is assigned to each task, and the progress of completion from “assigned” to “done”.

Task	Assigned To	Status			
		Assigned	Done	Done	Done
Identify Disaster Planning Project Team	Name Here	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Identify Disaster Management Team	Name Here	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Identify Critical Systems and Services	Name Here	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Perform Business Impact Analysis	Name Here	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Complete Disaster Risk Analysis	Name Here	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Develop Statement of Plan Scope	Name Here	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Obtain Management Board Approval	Name Here	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Edit Plan Introduction & Recovery Strategies	Name Here	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Finalize Response Procedures in Section 3	Name Here	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Finalize Disaster Declaration Policies	Name Here	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Complete Bond & Insurance Audit	Name Here	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Complete Liquidity & Funding Review	Name Here	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Complete Section 11 Insurance & Funding	Name Here	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Complete Records Retention Review	Name Here	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Complete Operation Procedures Review	Name Here	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Complete Section 12 Reference Information	Name Here	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

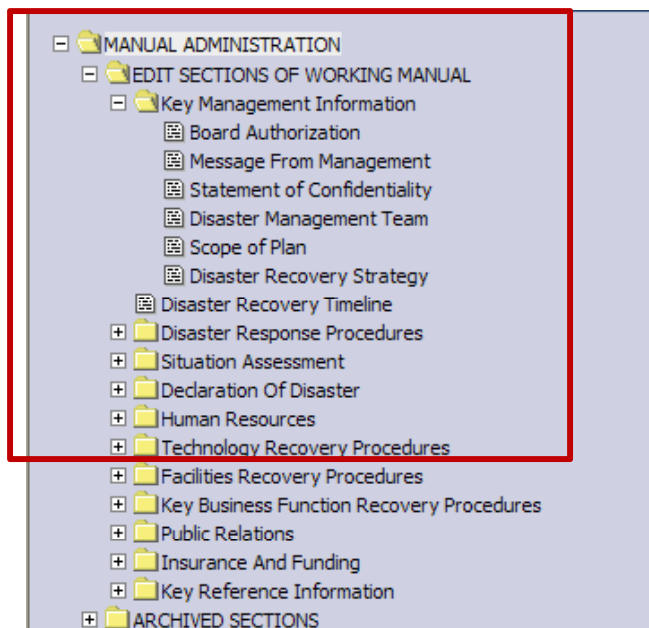
Tip: to get back to the Implementation Guide and related links at any time, click on the Manual Administration Folder.

Manual Builder – The Working Manual

The first available section within *Manual Administration* is **EDIT SECTIONS OF WORKING MANUAL**. 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 (continued)

The *Working Manual* is divided into Main Sections, represented by folders. Expand each Main Section folder to view the sub-sections found within that Main Section.

Each Section and the sub-sections within each Section 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.

The screenshot displays the 'Recovery Pro Section Editor: Statement of Confidentiality' interface. On the left is a tree view of the manual's structure, with 'Statement of Confidentiality' highlighted in red. The main editor area features a title bar, a 'Page Name' field containing 'Statement of Confidentiality', and a 'Revised Date' field with 'select date' and 'remove date' buttons. There are also checkboxes for 'Do Not Publish Section' and 'Auto Update Revised Date', along with 'Copy Section To Archive' and 'Preview Section' buttons. Below this is a rich text editor toolbar with options for bold, italic, underline, text color, background color, font size, and text alignment. The main content area contains two paragraphs of text: 'This plan is strictly confidential. Full copies of the plan are kept by each member of the Disaster Management Team and at each credit union facility. Abbreviated copies of the plan are provided to each staff member and volunteer.' and 'Accurate information is essential for staff and members to facilitate the timely recovery from a disaster. All critical information will be directed to the Public Information Officer. All questions from the news media or others regarding the plan or any disaster should be directed to the Public Information Officer.' A large blue box with the text 'Content shows here' is overlaid on the bottom right of the content area. At the bottom left of the editor is a 'Save Section' button.

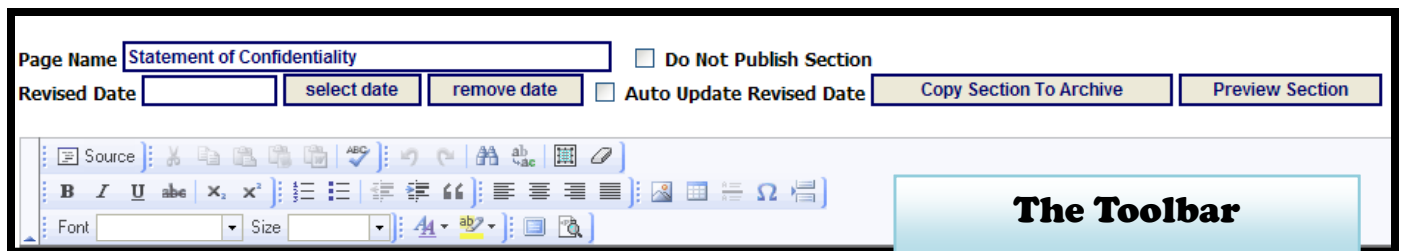
Manual Builder – The Working Manual (continued)

The Toolbar

The full text for all sections 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.


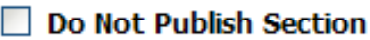
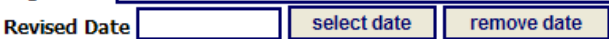
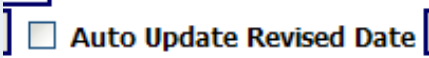
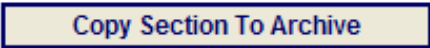
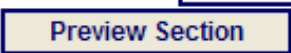
The Toolbar has many of the same tools that are used in Word.



Manual Builder – The Working Manual (continued)

The Toolbar (continued)

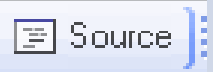







The following section outlines the functions of each item in the Toolbar.

Icon	Function
	<p>The Page Name field is the title of the section. This can be updated at any time.</p>
	<p>Checking the “Do Not Publish Section” box will omit this section from any manuals published from this point forward (until the box is unchecked).</p>
	<p>Use the “Select Date” button to add a date to the “Revised Date” field. The Revised Date will appear below the title of the section in the published manual.</p> <p>The “remove date” button removes the date from the field.</p>
	<p>Checking the “Auto Update Revised Date” button will automatically place the current date in the “Revised Date” field each time the section is saved. See page 41 for information on how to automatically check or uncheck this box on all policies in your manual.</p>
	<p>“Copy Section to Archive” will place a copy of the current version of the section into the Archive. See p. 28-30 for more information</p>
	<p>“Preview Section” allows you to view how the section will look when printed. You can also print this single section from the “Preview”.</p>

Manual Builder – The Working Manual (continued)

The Toolbar (continued)

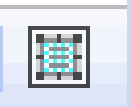


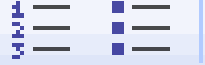
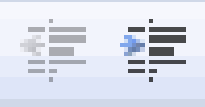



The following section outlines the functions of each item in the Toolbar.

Icon	Function
	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 , Copy and Paste
	Paste Text – Pastes text into the content as Plain Text. All formatting is removed from the text being pasted. Very useful when pasting from MS Word.
	Paste from Word – Pastes text into the editor while stripping out the code used in MS Word, which can interfere with formatting in the PlanningPro editor.
	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 section for specific text.
	Replace – Allows you to search the current section for specific text and replace it with new text.

Manual Builder – The Working Manual (continued)

The Toolbar (continued)

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

Icon	Function
	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.
	Block Indentation. Allows blocks of text to be indented to the right (or moved back to the left). Often used in conjunction with bullets and numbering formatting.
	Block Quote. Creates indentation 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 22-24 for more information on inserting graphics.

Manual Builder – The Working Manual (continued)

The Toolbar (continued)



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

Icon	Function
	<p>Insert/Edit Table. Inserts a table into a table or allows editing of an existing table. See pages 25-26 for more information on Tables.</p>
	<p>Horizontal Rule – places a horizontal line across the screen.</p>
	<p>Character Map – allows the placement of special characters within the text.</p>
	<p>Page Break – Allows the user to manually insert a page break when this page is printed (single section print or published manual print).</p>
	<p>Font – Standard tool to allow changes to font type face.</p>
	<p>Size – Standard tool to allow changes font size.</p>
	<p>Text Color – allows color changes to highlighted text.</p>
	<p>Background Highlighting – Highlights behind text.</p>

Manual Builder – The Working Manual (continued)

The Toolbar (continued)

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

Icon	Function
	Maximize Editor. Increases the editor size – some toolbar icons and tools below the editor are hidden when this icon is used. Click on the icon again to restore these hidden tools.
	Show Blocks. Shows individual blocks of text throughout the document.

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: When pasting from Word or other Microsoft documents, it is recommended to use the “Paste as Plain Text” or “Paste from Word” icon in the Toolbar.

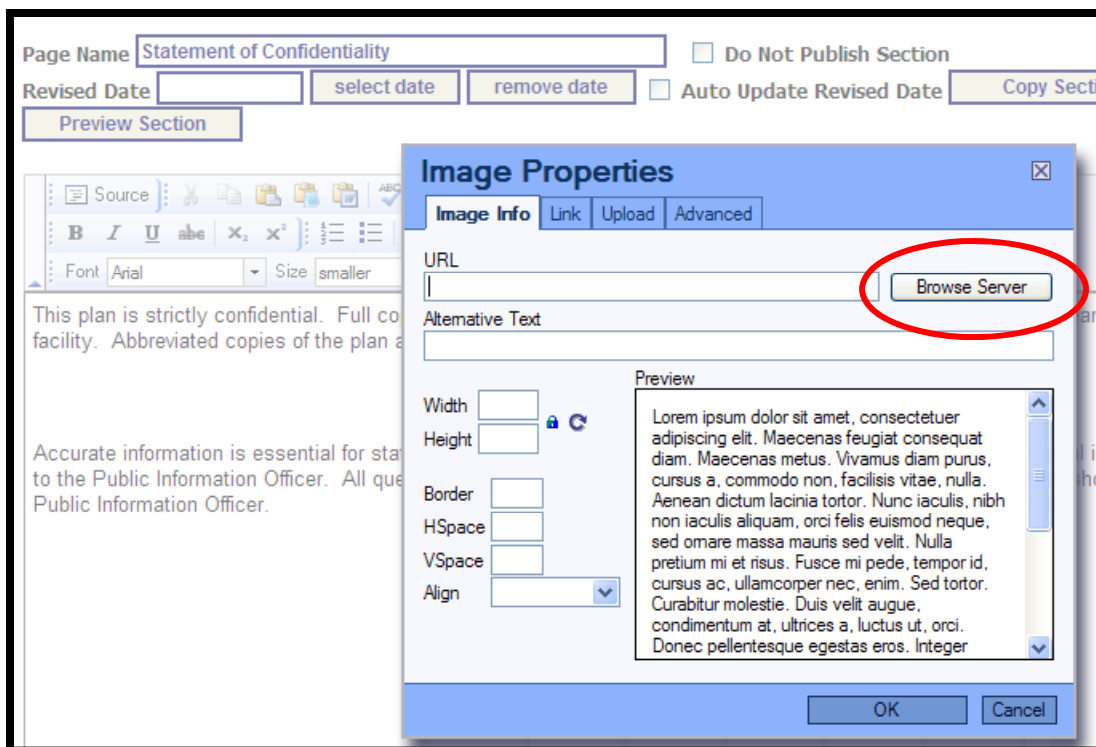
Microsoft products often have code behind the scenes that is used to format text within the Microsoft environment, but which will not work well in other editors, such as the RecoveryPro editor. Using “Paste as Plain Text” or “Paste from Word” functions will strip out the extraneous code, allowing you to format the text easily.

Manual Builder – The Working Manual (continued)

Inserting and Editing Graphics

To insert a graphic:

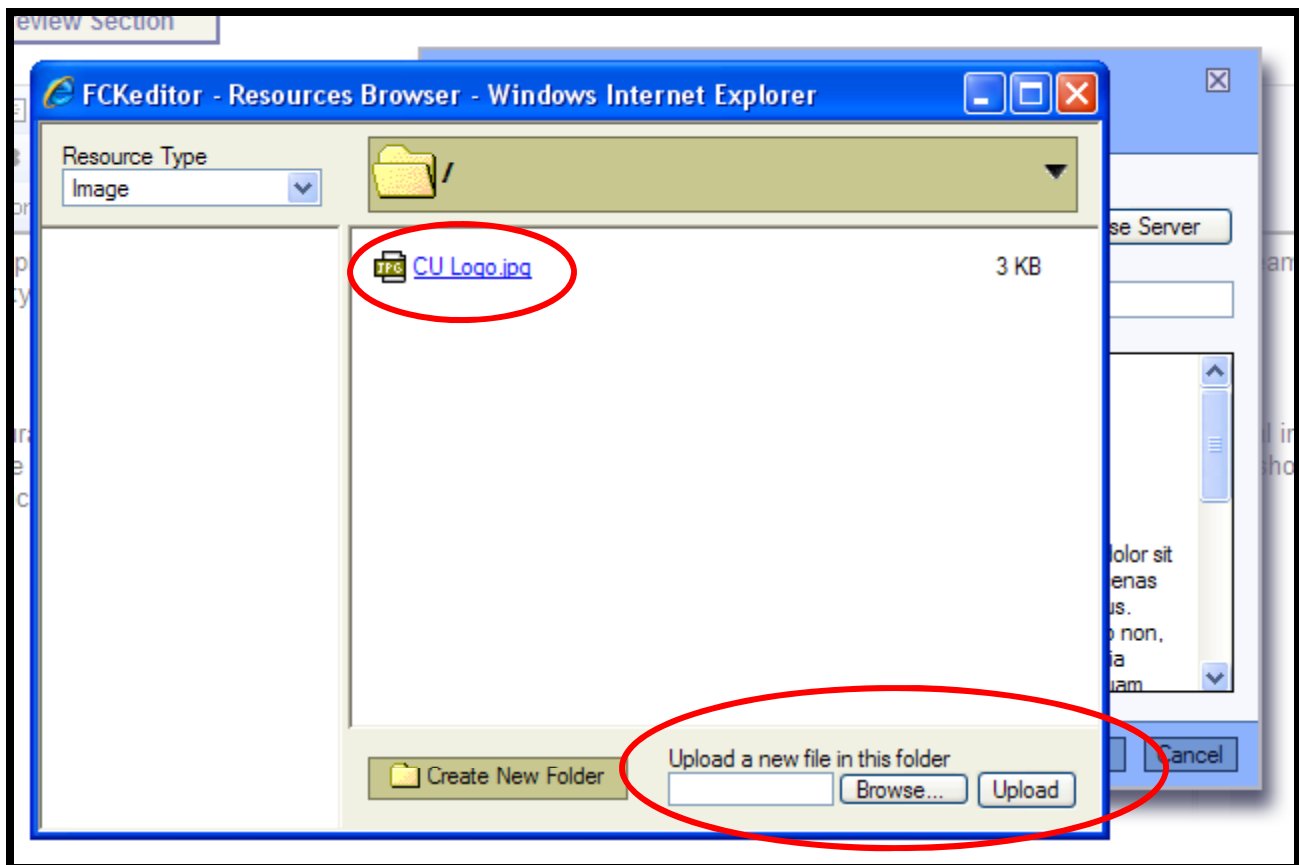
1. Make sure your cursor is in the exact position where you want the graphic inserted.
2. Click the “Insert/Edit Graphic” icon. 
3. A form will pop up giving you some options for your picture.
4. To upload your own image or access existing images in the image library, click the “Browse Server” button.



Manual Builder – The Working Manual (continued)

Inserting and Editing Graphics (continued)

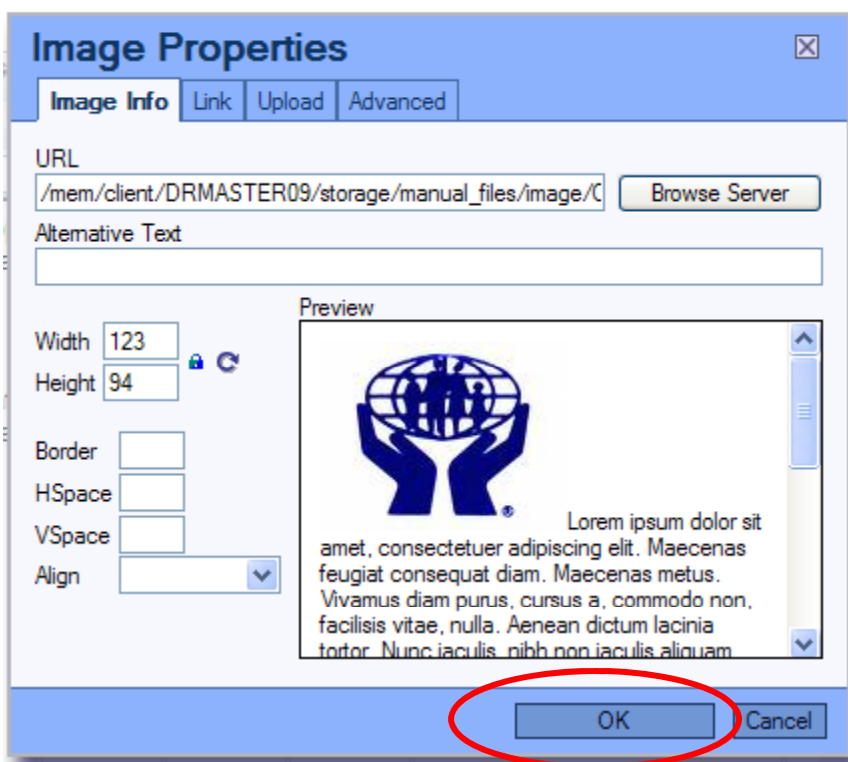
5. A new window will open showing a directory of all the images in the image library. To choose an image already in the library, click on the linked name of the image.
6. To upload a new image, use the “browse” button to find your image, then click the Upload button to add the image into the library.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



Manual Builder – The Working Manual (continued)

Inserting and Editing Graphics (continued)

- 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
- When you have set your image properties, click OK to insert your image. See Appendix B for information on image properties and how they affect the look of the inserted image.



Note: When you upload an image, a new folder is created in the STORAGE area called "manual_files" with a sub-folder inside it called "images".

Your uploaded images will be stored (and are visible) in the "images" folder. Do Not Delete these folders or files from the Storage area or they will not be available for your manual!

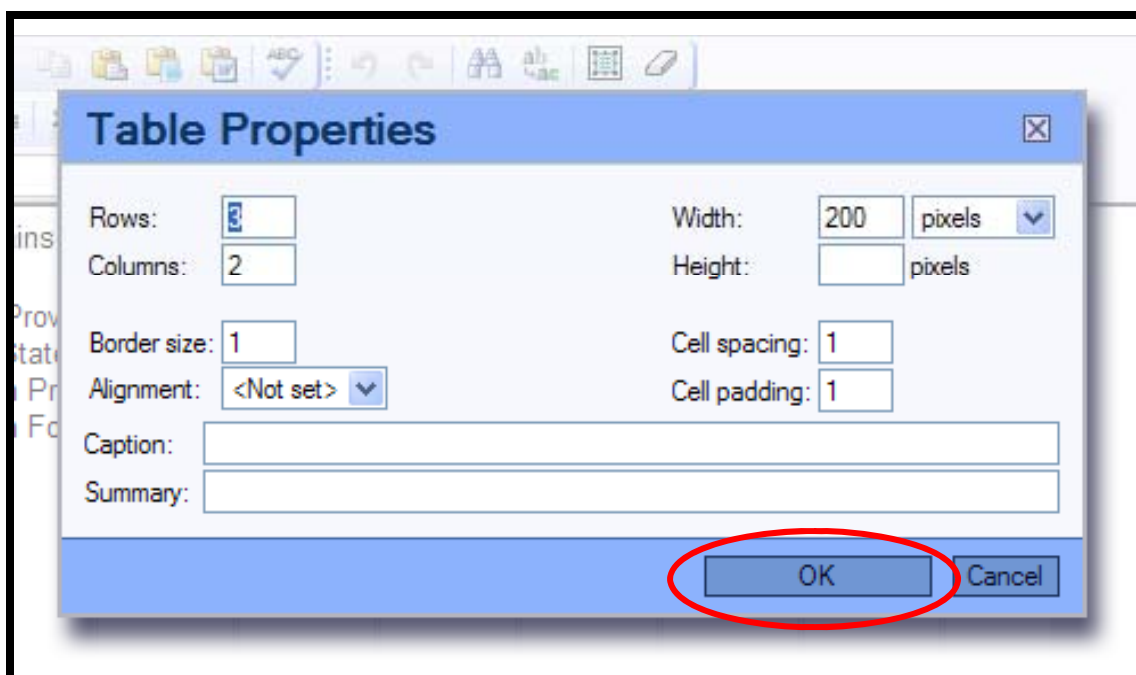
Manual Builder – The Working Manual (continued)

Inserting and Editing Tables

Tables are a good tool to use for offsetting information, or displaying several text items side-by-side.

To insert a table:

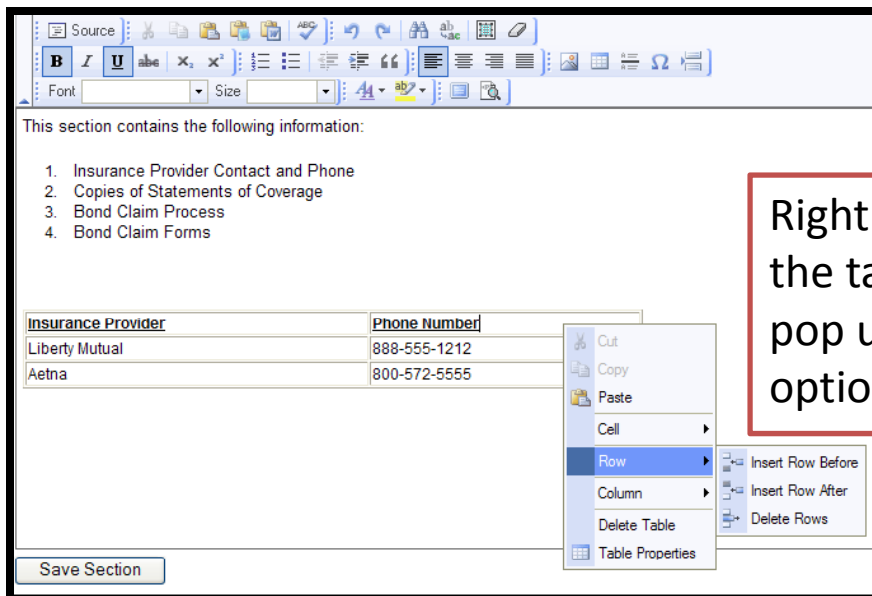
1. Make sure your cursor is in the exact position where you want the table inserted.
2. Click the “Insert/Edit Table” icon.
3. A form will pop up giving you some options to customize your table.
4. When you have set your table options, click OK to insert your table. See Appendix C for information on table properties and how they affect the set up of the inserted table.



Manual Builder – The Working Manual (continued)

Inserting and Editing Tables

4. 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.
5. Once your table has been inserted, you can modify the entire table, add/delete rows, or modify a single cell.
6. To modify an existing table, place your cursor inside any area of the table, and right click the mouse 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).



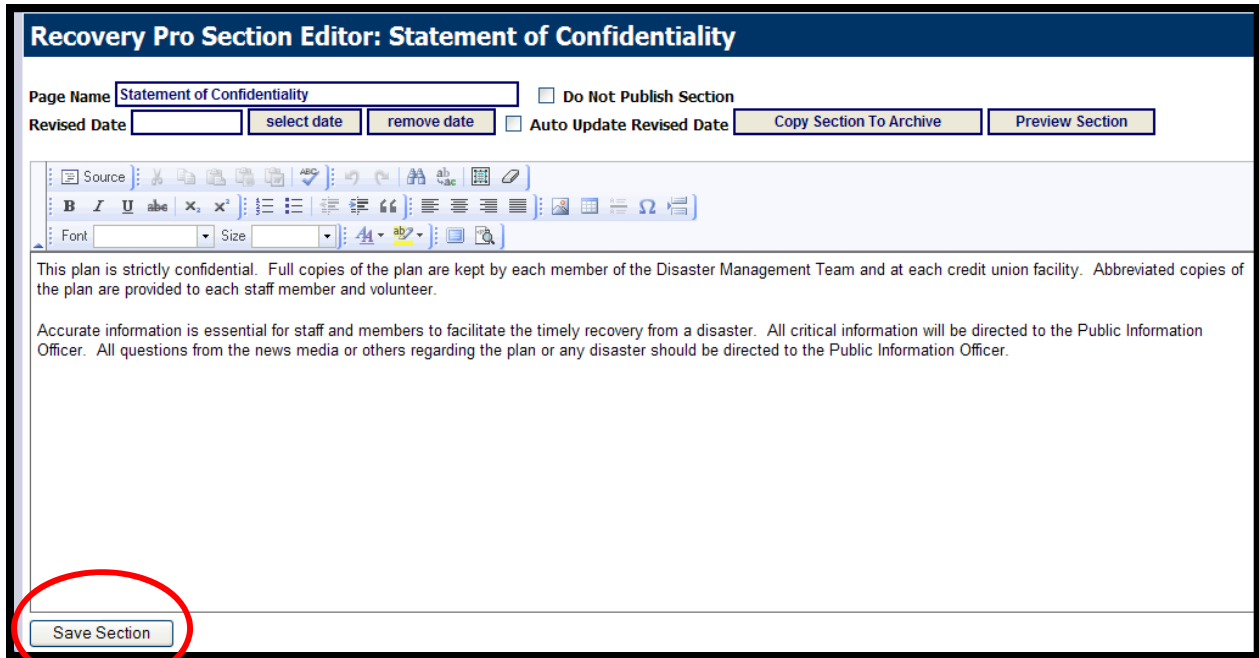
Tips: The columns will automatically adjust based on the amount of text in each. While there is no “set column width” option per se, you can use “Cell Properties’ under the Cell Options area to set the width of the first cell in each column. This essentially sets column width. We recommend setting the 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 – The Working Manual (continued)

Saving Your Work

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



Note: You will be notified if the system detects content that has not been saved. If you click into the content area, even if you do not make a change, the system may assume you’ve made changes and will ask if you want to save. If you need to save the current content, click “OK”. If you know that no actual changes were made, click “Cancel” to move on.

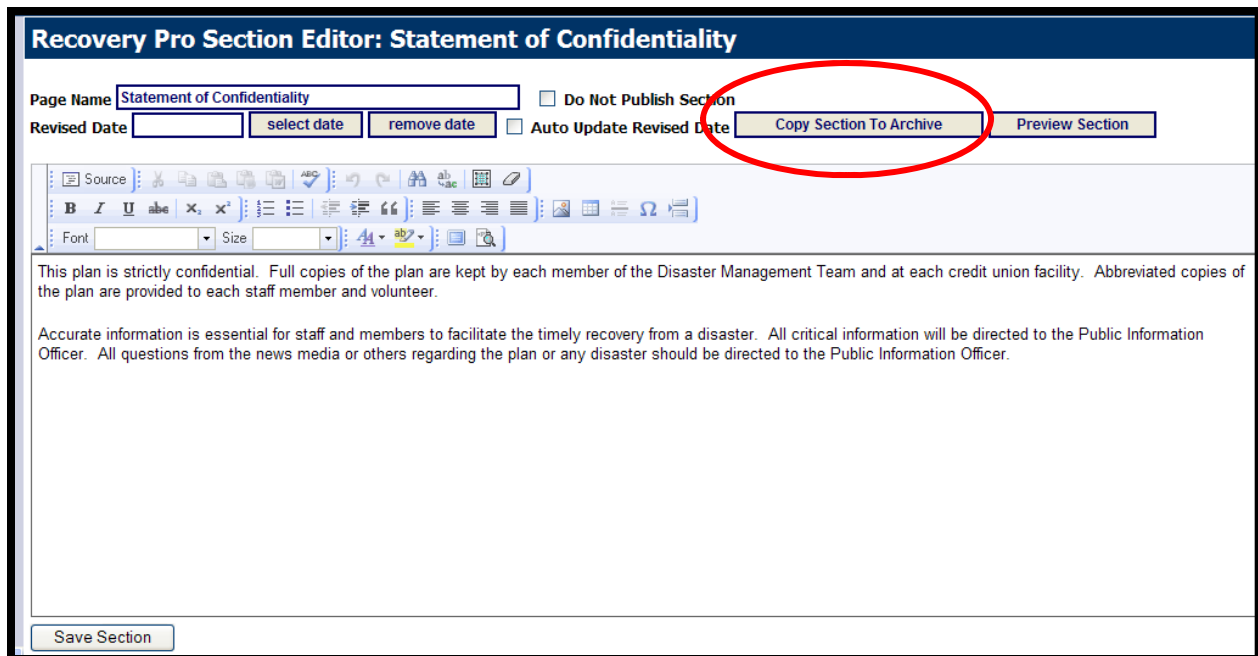
Also, some Internet browsers will place the cursor back into the content area after clicking the “Save” button, which will cause the “Save” notification to appear again even though you just saved the content. Click “Cancel” to move on to the next section.

Manual Builder – The Working Manual (continued)

Archiving Sections

If you wish to make a copy of a section before making changes to it, you can place a copy in the *Archive*.

To archive a section, click the “Copy Section to Archive” button in the Toolbar. A pop-up box will appear confirming that the section has been archived.

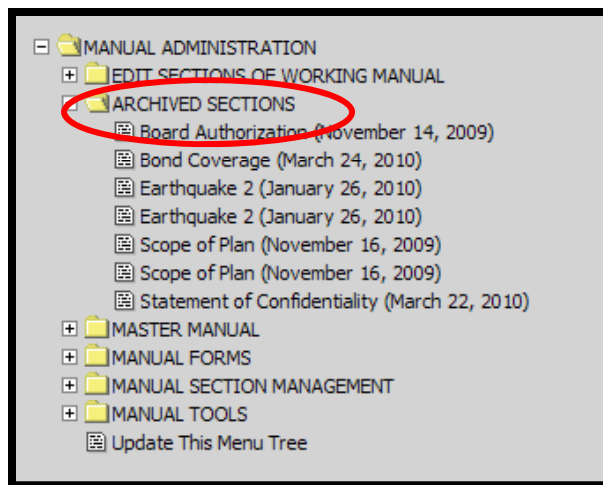


This will make a ‘point in time’ copy of this section. Once in the *Archive*, the archived version of the section can be viewed, printed or restored back to the Working Manual. See page 29-30 for information on viewing and retrieving policies from the Archive.

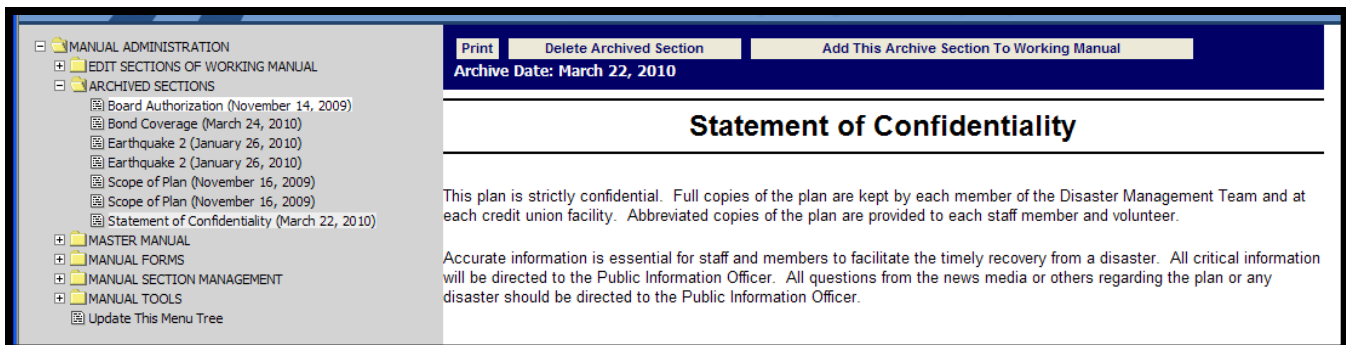
Manual Builder – The Archive

Accessing the Archive

1. To access the *Archive*, expand the “Archived Sections” folder in the left navigation.
2. An alphabetical listing of all archived sections will appear, each with the date that the section was archived. For more information on how to add a section to the Archive from the *Working Manual*, see page 28.)



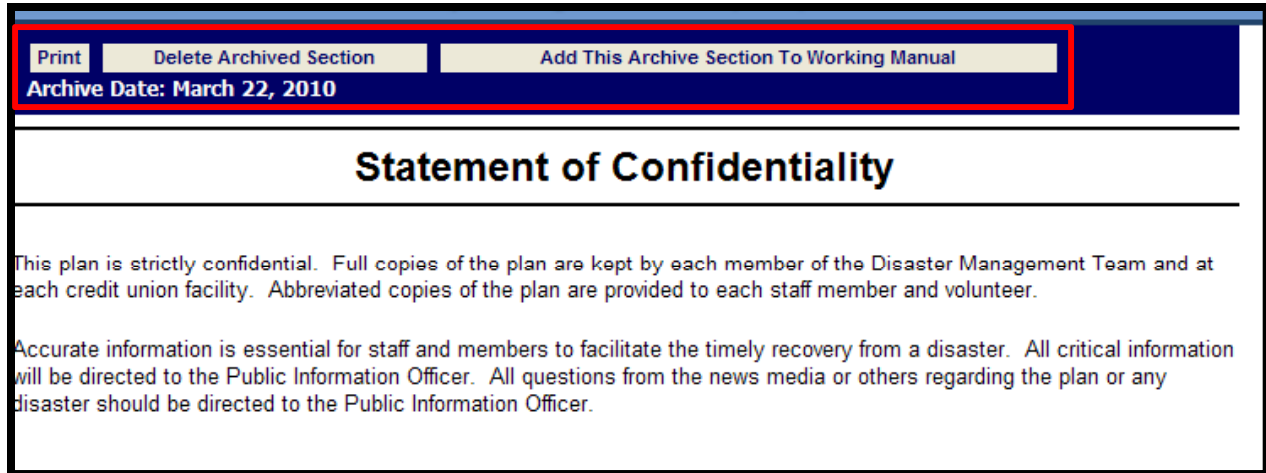
Click on any of the archived sections and the full text of that archived section will appear on the right hand side of the screen. You can view and print the text, as well as delete the archived section, or copy this entire section back into your *Working Manual*.



Manual Builder – The Archive

Un-Archiving a section

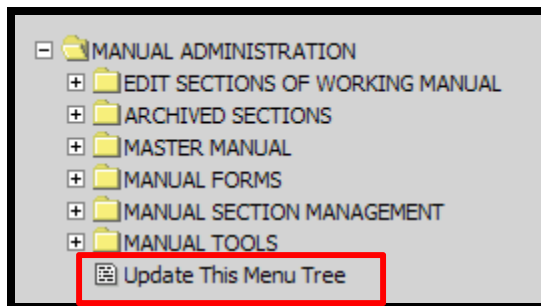
1. To un-archive a section, simply open the section within the *Archive*.
2. Click the “Add This Archive to Working Manual” button, and the section is now added back to your *Working Manual*.



Tip: When un-archiving, be sure to first remove the unwanted version of the section from your Working Manual (see page 40), then un-archive the proper version of the section. Un-archiving a section will not overwrite the section in the *Working Manual*, but you will then have two versions of the sections (the correct and the incorrect) in your Working Manual.

Section Does Not Show In Archive

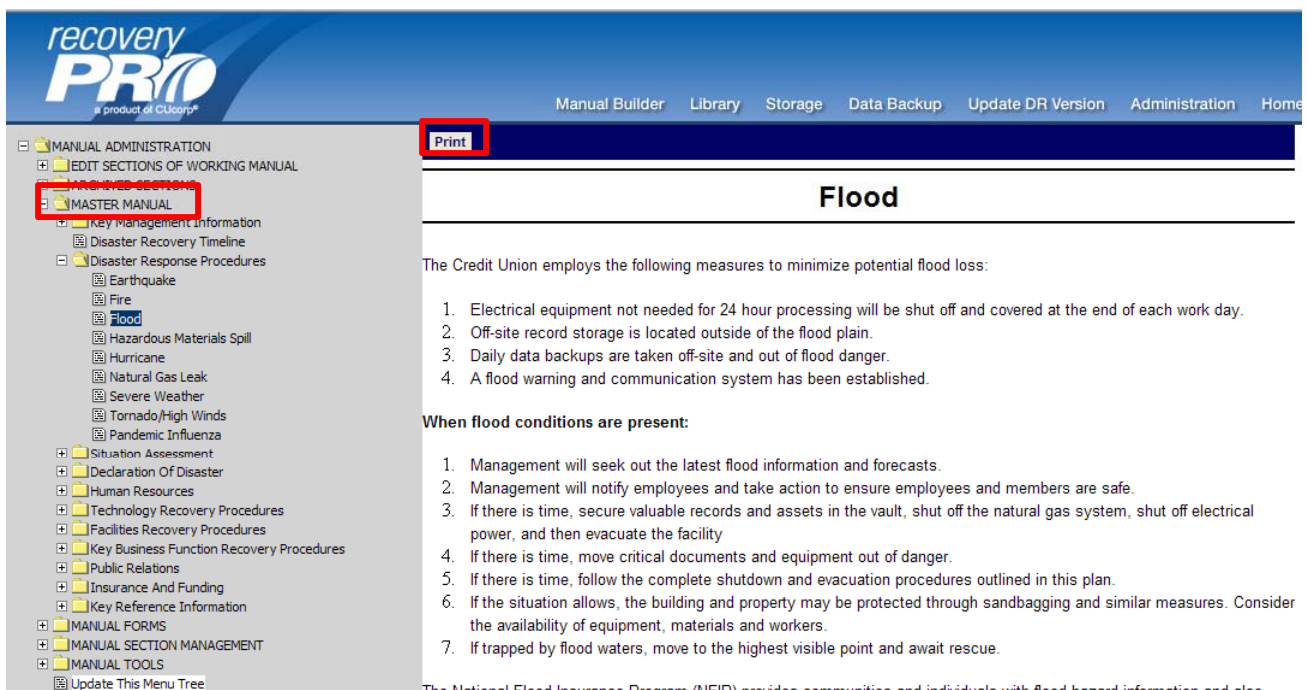
If a recently archived section is not showing in archived section, the Menu Tree may need to be refreshed. Simply click the “Update This Menu Tree” link at the bottom of the navigation and check the archive again.



Manual Builder – The Master Manual

Accessing the Master Manual

1. To access the *Master Manual*, expand the “Master Manual” folder in the left navigation.
2. A listing of the original master sections of the manual will show. This is for reference in case you have made changes in your *Working Manual* and want to see what the original master text was before the changes. You cannot edit the *Master Manual* text.
3. Click on any of the master manual sections and the full text of that section will appear on the right hand side of the screen. You can view and print the text.

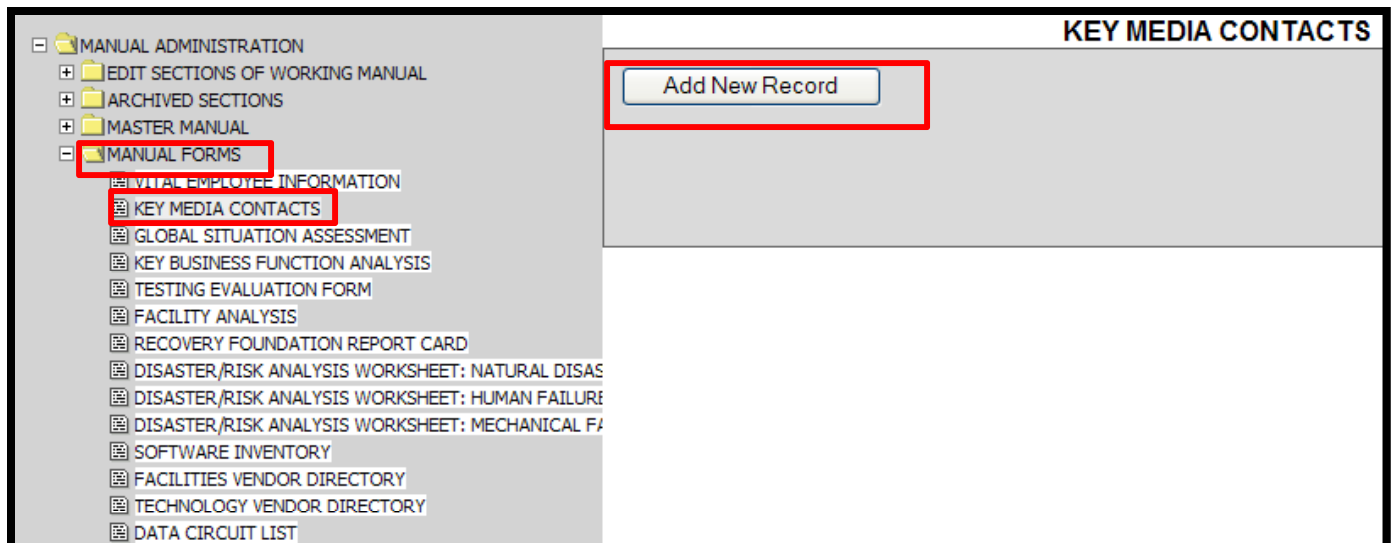


Tip: If you need to reset any section back to the Master Manual content, simply highlight and copy the text in the *Master Manual* viewing area for that section. Then go to your *Working Manual* and paste the text into the content editor.

Manual Builder – Manual Forms

Adding Content to Manual Forms

1. To access the *Manual Forms*, expand the “Manual Forms” folder in the left navigation.
2. A listing of all available forms will show.
3. Click on any of the form names to begin working with that form.
4. Click the “Add New Record” button to open a blank form.



Manual Builder – Manual Forms

Adding Content to Manual Forms (continued)

5. Type the appropriate information into each field.
6. When finished, click “SAVE”
7. To add additional form entries, click the “Add New Record” button again - **You must SAVE each form entry individually before adding a new record.** Clicking the “ADD NEW RECORD” button without saving the current form will simply close the form you are working on.

Manual Builder Library Storage Data Backup Update DR Version Administration Home

KEY MEDIA CONTACTS

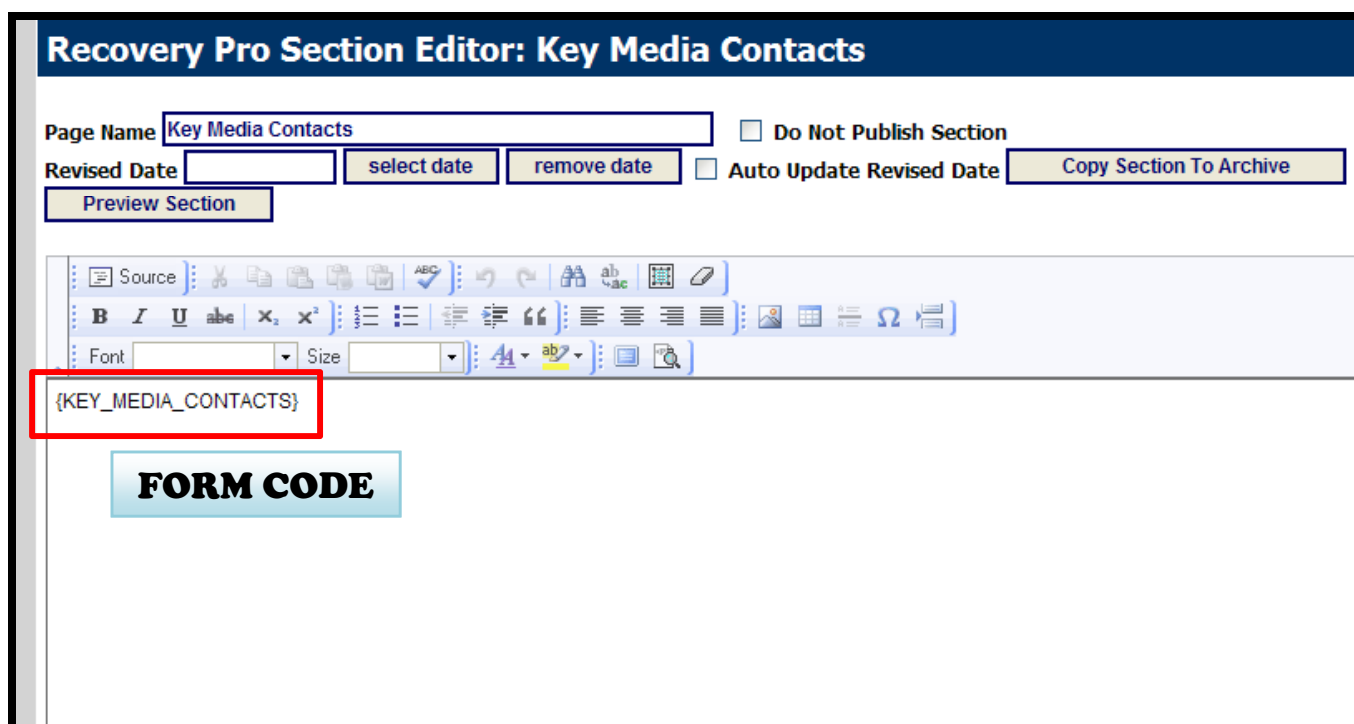
Media Source WWJ - News Radio 950		Type of Media Radio	
Correspondent Name John Smith	Position Anchor	Phone 555-555-5555	Alt Phone/E-Mail <input type="text"/>
Management Contact Name Mary Poppins	Position Manager	Phone 555-555-5555	Alt Phone/E-Mail <input type="text"/>
Street Address <input type="text"/>	City <input type="text"/>	State <input type="text"/>	Zip <input type="text"/>
Comments Call 950 first as most of our membership is in the listening area			
<input type="button" value="Save"/>		<input type="button" value="Delete"/>	

[To Excel](#)

Manual Builder – Manual Forms

Viewing Form Content In the Working Manual

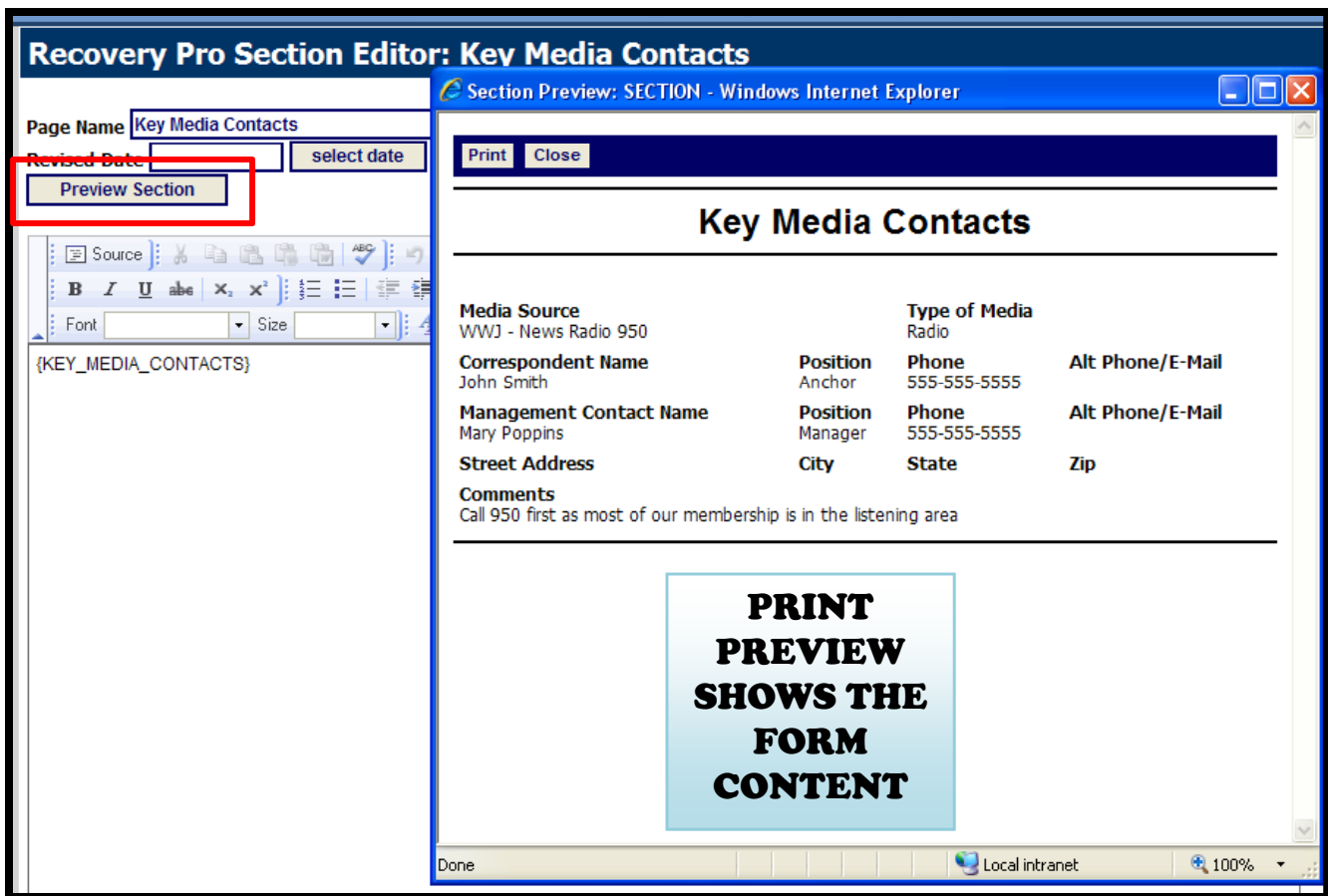
1. To view the form content in the working manual, go to the section of the Working Manual where the form is inserted (for a list of forms and their corresponding working manual sections, see Appendix D)
2. The form will be embedded as a piece of code within the content. This code may be co-mingled with other text, or may be the only content on the page.
3. When viewing the editing screen, you will ONLY see the form code, not the content of the form itself.



Manual Builder – Manual Forms

Viewing Form Content In the Working Manual (continued)

4. Use the “PREVIEW” button to view the form content within the section. When viewed or printed, the form code will be replaced by any content entered into the form.
5. Text may be added above or below the form code.

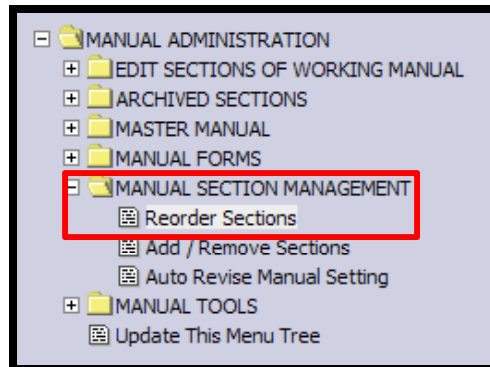


Manual Builder – Manual Section Management

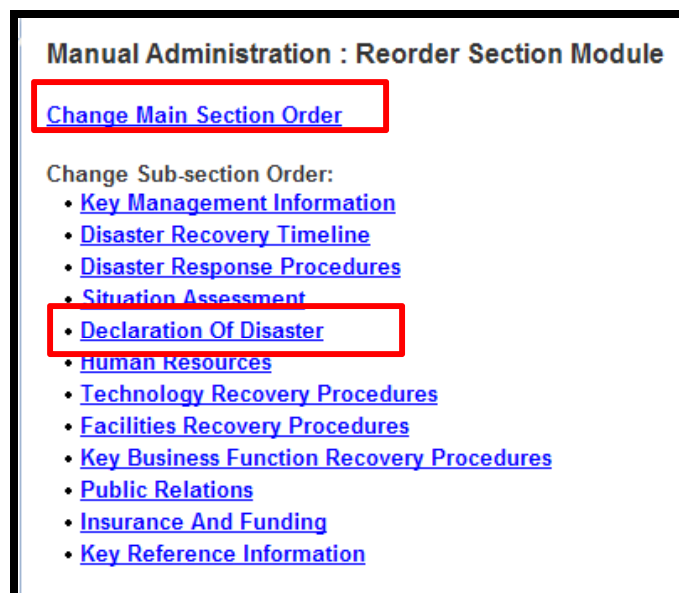
Manual Section Management allows you to Reorder Sections, Add or Remove Sections, and set the Auto Revise Date setting for all sections of the manual.

Reorder Sections

1. Click the “Reorder Sections” link under the *Manual Section Management* folder.



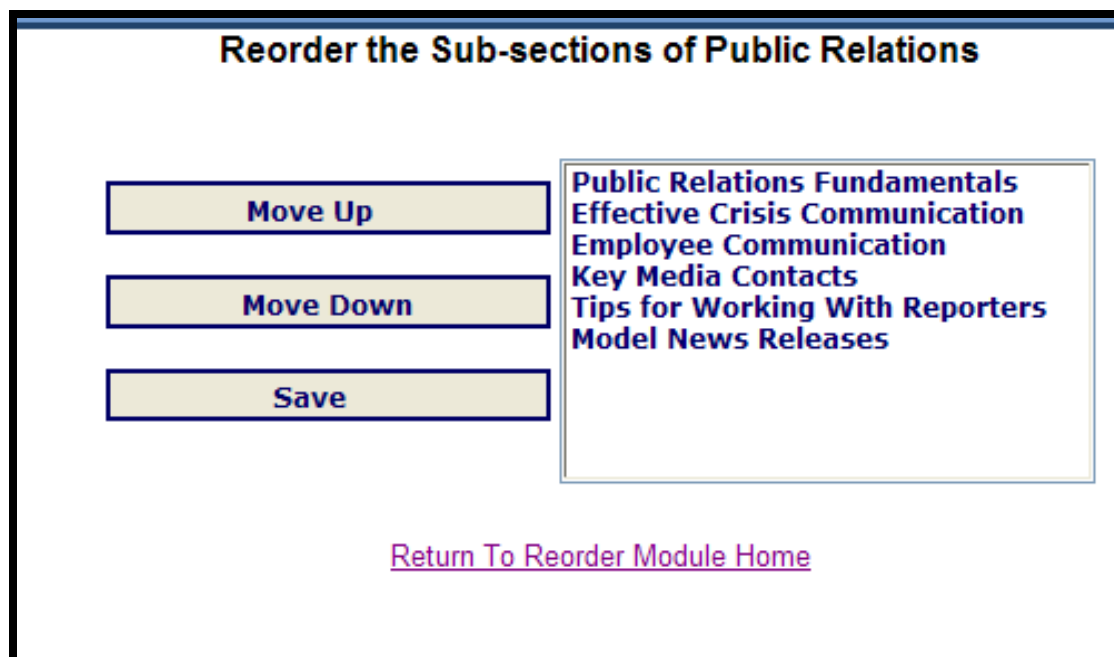
2. The right side of the screen will display your options.
3. Either click on the link to “Change Main Section Order” or click on which an individual section to reorder.



Manual Builder – Manual Section Management

Reorder Sections (continued)

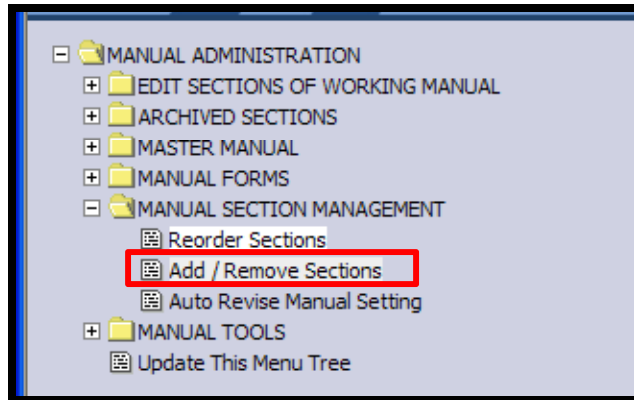
4. A list of all sub-sections for the chosen section will appear
5. Click on any sub-section you wish to move, then use the MOVE UP and MOVE DOWN buttons to change the order of the sub-sections.
6. When you are satisfied with the order, click SAVE.
7. These sections will now be in the new order within your working manual.



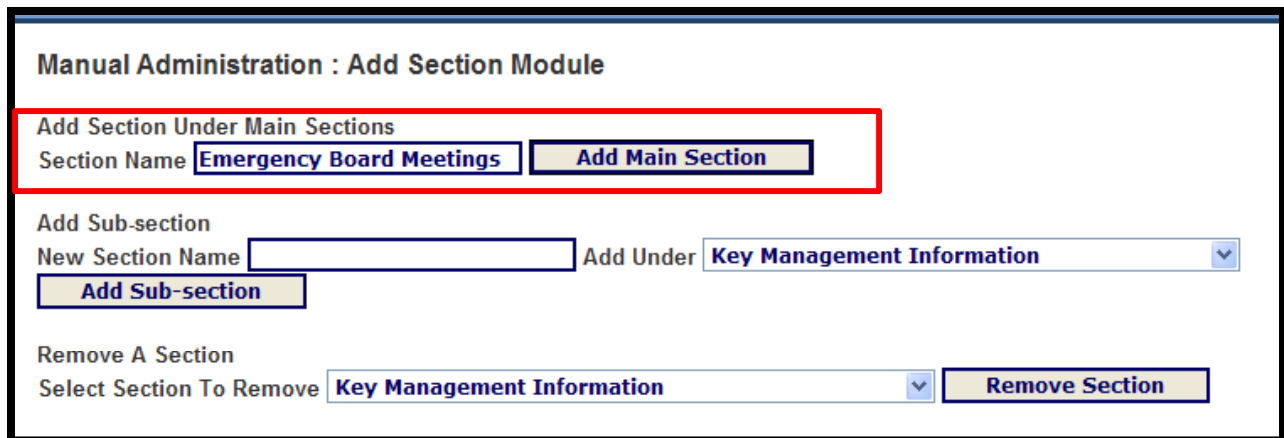
Manual Builder – Manual Section Management

Adding a Section

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



2. The right side of the screen will bring up a form which allows you to add a new main section or a new sub-section.
3. To add a new MAIN section, type in the new section name under the “ADD SECTION UNDER MAIN SECTIONS” area.
4. Click the ADD MAIN SECTION button.
5. The new section is now available in your working manual. Sub-sections can also now be added to this new main section.

A screenshot of a web form titled 'Manual Administration : Add Section Module'. The form is divided into three main sections. The first section, 'Add Section Under Main Sections', is highlighted with a red border and contains a text input field with 'Emergency Board Meetings' and an 'Add Main Section' button. The second section, 'Add Sub-section', contains a text input field for 'New Section Name', a dropdown menu for 'Add Under' with 'Key Management Information' selected, and an 'Add Sub-section' button. The third section, 'Remove A Section', contains a dropdown menu for 'Select Section To Remove' with 'Key Management Information' selected and a 'Remove Section' button.

Manual Builder – Manual Section Management

Adding a Section (continued)

6. To add a new SUB- SECTION, section, type in the new section name under the “ADD SUB-SECTION” area.
7. Using the dropdown list, choose the main section where the new sub-section should be added.
8. Click the ADD SUB-SECTION button.

Manual Administration : Add Section Module

Add Section Under Main Sections
Section Name

Add Sub-section
New Section Name Add Under

Remove A Section
Select Section To Remove

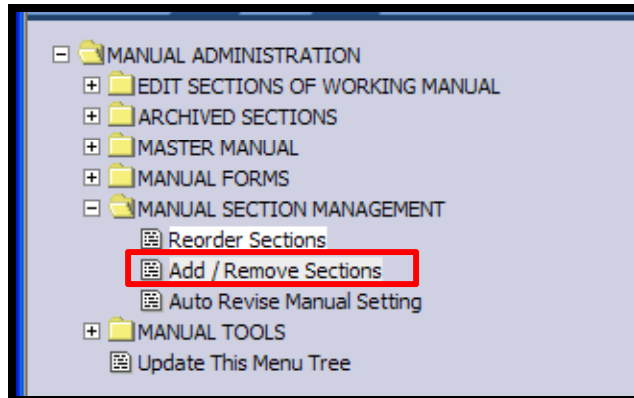
Public Relations
Key Management Information
Disaster Recovery Timeline
Disaster Response Procedures
Situation Assessment
Declaration Of Disaster
Human Resources
Technology Recovery Procedures
Facilities Recovery Procedures
Key Business Function Recovery Procedures
Public Relations
Insurance And Funding
Key Reference Information

9. The new section is now available in your working manual.
10. New sections will be added as the last item in the area where they are placed. Use the “Reorder Sections” function (See pages 36-37) to place the new sections in the preferred order.

Manual Builder – Manual Section Management

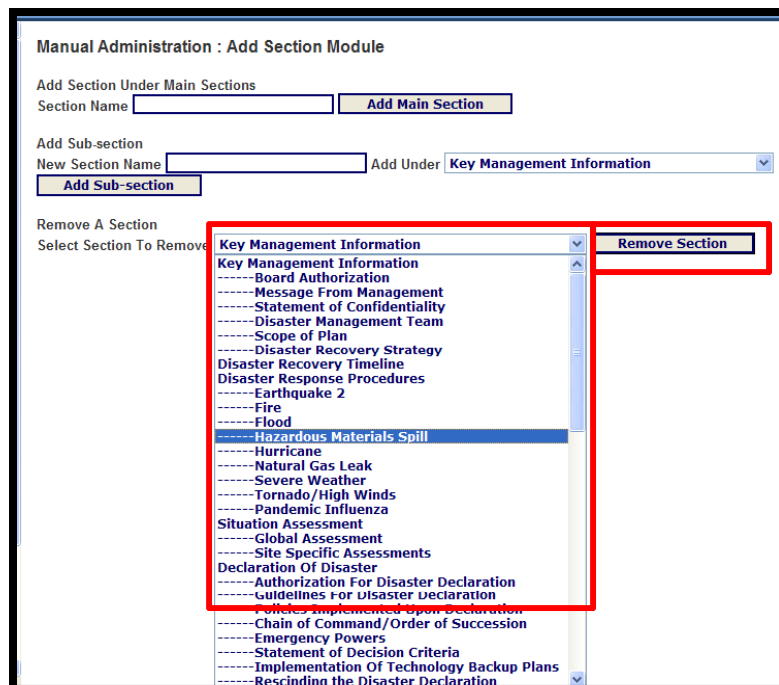
Deleting a Section

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



2. The right side of the screen will bring up a dropdown list which allows you to remove a section to your Working Manual.
3. Find the section you wish to remove from the dropdown list.
4. Click the REMOVE SECTION button and this policy will be removed from your working manual.

Note: 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 28) BEFORE you delete it.



Manual Builder – Manual Section Management

Auto Revise Manual Setting

1. 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.

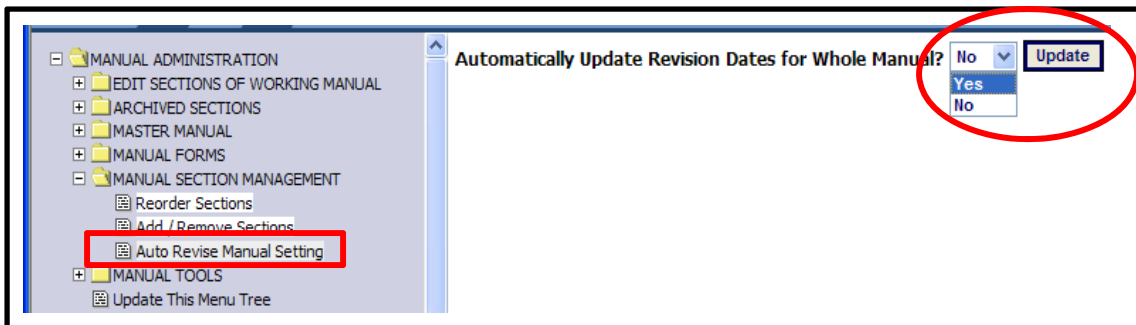
2. This is the button found in the Toolbar when you are editing a policy:



3. When this button is checked, clicking the “Save” button 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.

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

5. 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”.

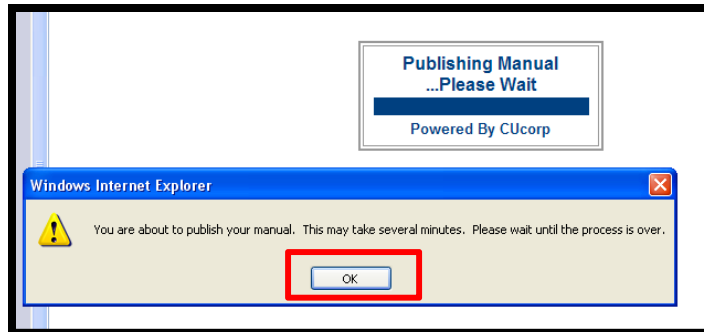
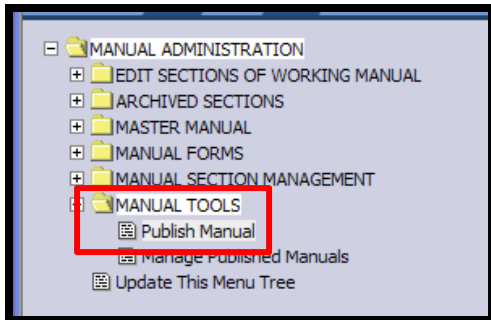


Manual Builder – Manual Tools

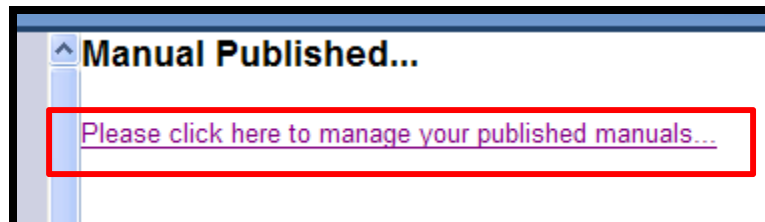
Publishing the Manual

Publish the manual is a process in which all the individual policies of the Working Manual are combined into one large, printable document. This process can take one to five minutes to complete.

1. To publish your manual, click the PUBLISH MANUAL link, found under the *Manual Tools* Folder.
2. A notification will appear on the right side of the screen that your manual is publishing and it may take several minutes. Click OK



3. Once the manual is published, you will receive a message that the manual is successfully published, with a link to manage your manuals.
4. Click the link



Note: The link in the confirmation message will take you to the same spot as the “Manage Published Manual” link with the Manual Tools in the navigation menu.

Manual Builder – Manual Tools

Manage Published Manuals

Managing your manuals allows you to print your manual, make it available for viewing on the Home Page for in the Manager Manual and/or Employees Manuals folder, export to Word, or delete a manual.

Viewing and Printing a Published Manual

1. 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.

The screenshot shows the 'Manage Published Manuals' interface. On the left, a manual titled 'Disaster Recovery Manual' is listed with a 'Date Published: 03/25/2010 13:35:40' and a 'View In' link. Below the title are two checkboxes: 'Allow Employees to view' and 'Allow Managers To view'. At the bottom of this section are two buttons: 'Update' and 'Delete Published Manual'. On the right, a preview window shows the 'DR Master 2009 Version Disaster Recovery Manual' with a 'Table Of Contents' section. The table of contents includes sections like 'Key Management Information', 'Disaster Recovery Timeline', and 'Declaration Of Disaster'. A blue callout box points to the 'View In' link, stating: 'A new window opens with the complete Working Manual in printable form'.

2. The Table of Contents contains clickable links that allow you to go directly to a particular section within the manual.
3. Click on the “Print” button to print the entire manual. For printing tips, see Appendix E.

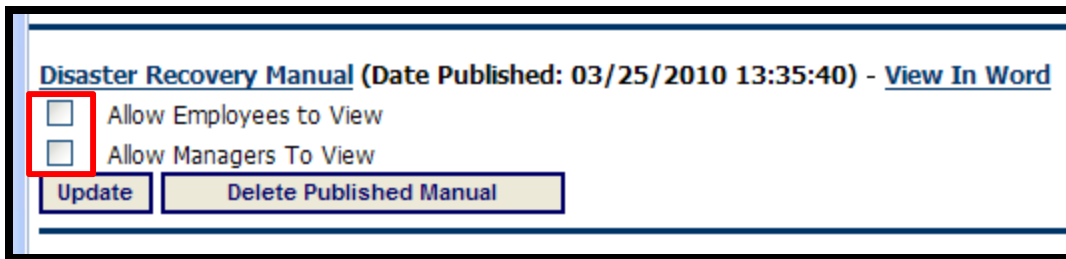
The screenshot shows the print view of the 'DR Master 2009 Version Disaster Recovery Manual'. A 'Print' button is highlighted in the top left corner. The main content area displays the title, the publication date 'Published Thursday 25th of March 2010 01:35:38 PM', and the 'Table Of Contents' section. The first item in the table of contents is 'Key Management Information'.

Manual Builder – Manual Tools

Posting Published Manuals on the Home Page

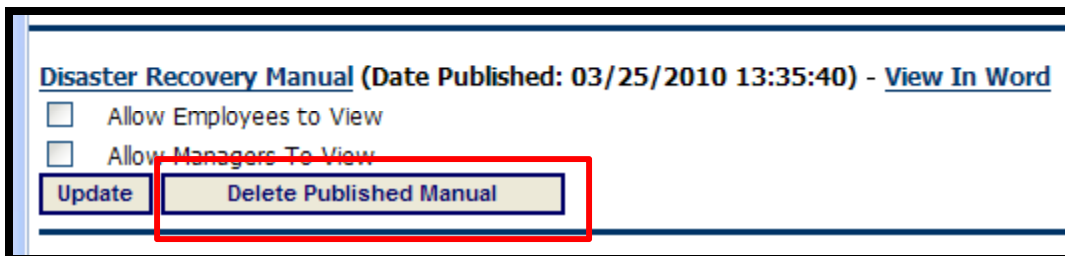
Links to the Published manual can be made available on the Home Page, within the “Manager Manuals” and/or the “Employee Manuals” folders.

1. Use the check boxes directly underneath a specific 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. If both boxes are unchecked, it will not be viewable on the homepage.
2. Click the “Update” button when finished.



Deleting Published Manuals

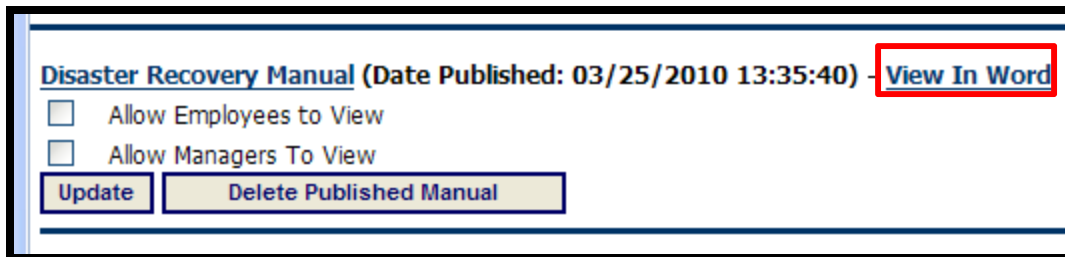
1. To delete a published manual, click the “Delete Published Manual” button directly beneath the manual you want to delete. Deleted manuals cannot be recovered.



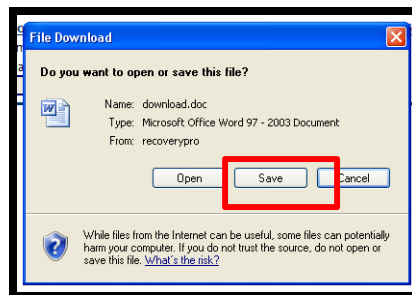
Manual Builder – Manual Tools

Export to Word

1. To Export your manual to Microsoft Word, click the “View In Word” link to the right of the specific published manual



2. A pop up box will ask if you want to open or save. Click SAVE.
Note: depending on your browser, you may not be able to open the document unless it is saved first.



3. Choose the location to save the document. It can now be opened from this location.

Notes on the Word Export:

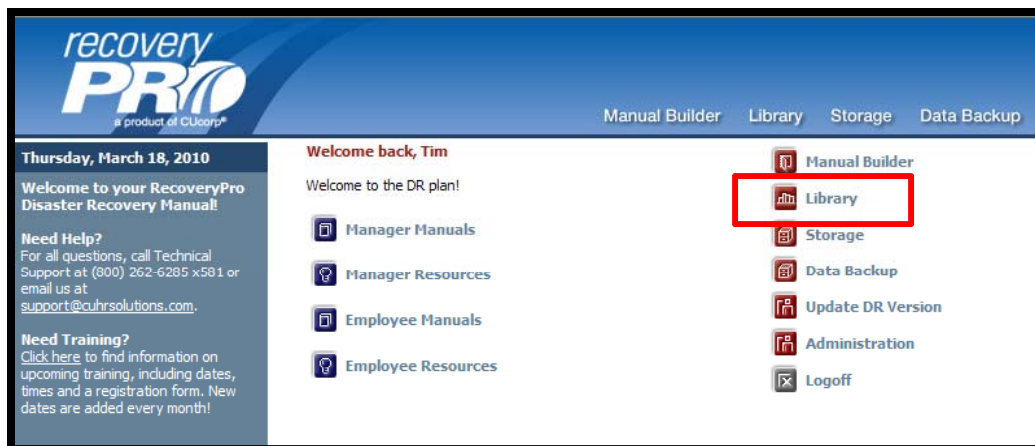
The RecoveryPro manual is meant to be viewed and printed within the RecoveryPro program. While the Word Export works well for having a emergency electronic copy of your policy available on your own server, the export does not retain all formatting from the system, and some formatting must be done in order to have a professional looking, clean copy of the manual.

- The table of contents does not carry into the Word Version and must be added manually.
- Page breaks between sections are not automatically generated in Word, although a text indicator for each page break is added. Page breaks must be manually entered and the text indicator removed.
- Word does not often recognize that numbered and bulleted lists from section to section should be restarted at “1” or “A”, therefore each new list continues the numbering from the previous section. Each section must be adjusted to start the list at “1” or “A”.

Library

Accessing the Library

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



The Library is divided into three sections:

1. **Samples.** This section has sample verbiage that can be used in various sections of your plan. Of course all sample verbiage must be reviewed and customized for your credit union.
2. **Tools.** The *Tools* area provides additional resources and guidance to help you develop your plan.
3. **Printable Forms.** This section has blank, printable versions of all the forms.

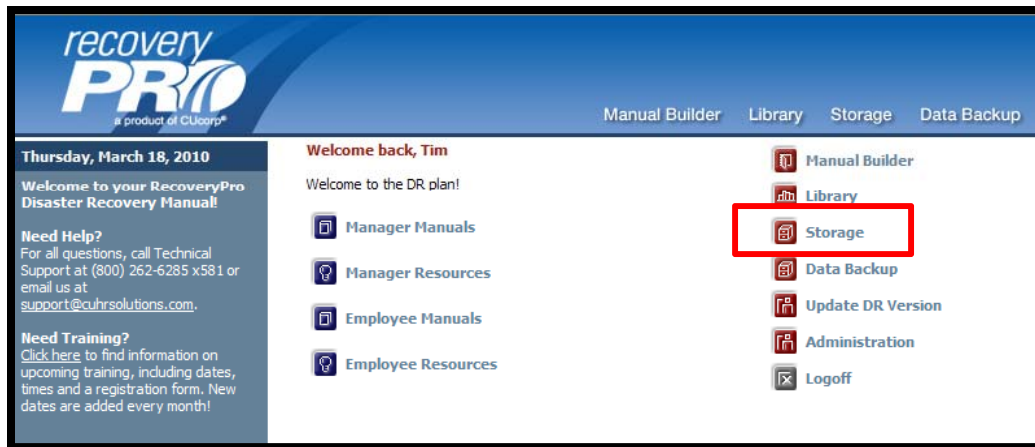
To access any of the items in the *Library*, simply click on the name of the folder (or the plus/minus sign to the left of the folder), and click on the item you want to view. The item will open in a new window.

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

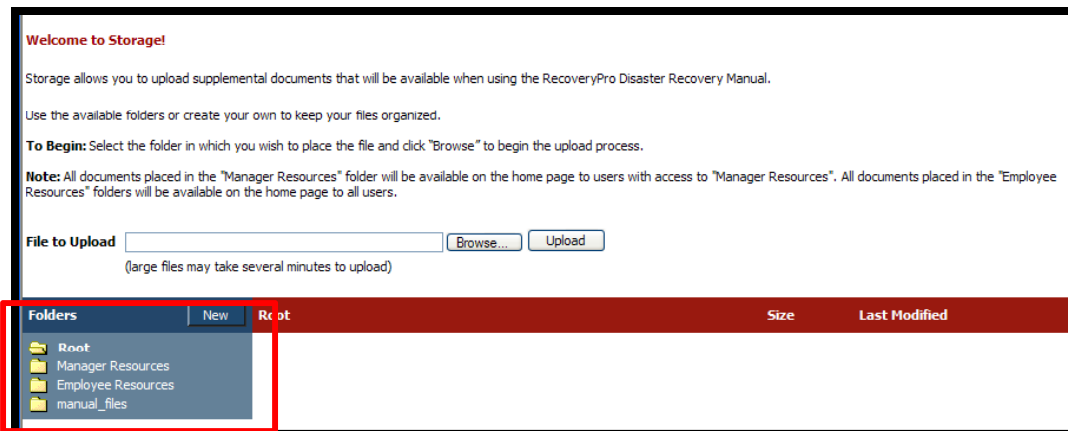
Accessing Storage

Click on “Storage” in the right hand navigation of the *Home Page* to access the Storage Area. The Storage area allows you to upload and store documents. Once in storage, document can be posted to the Home Page, either in the “Manager Resources” or “Employee Resources” folder.



Storage File Structure

By default, the Storage area contains three folders: “Root”, “Employee Resources”, and “Manager Resources”. If you have uploaded any graphics to your Working Manual, you will also see a “manual_files” folder.

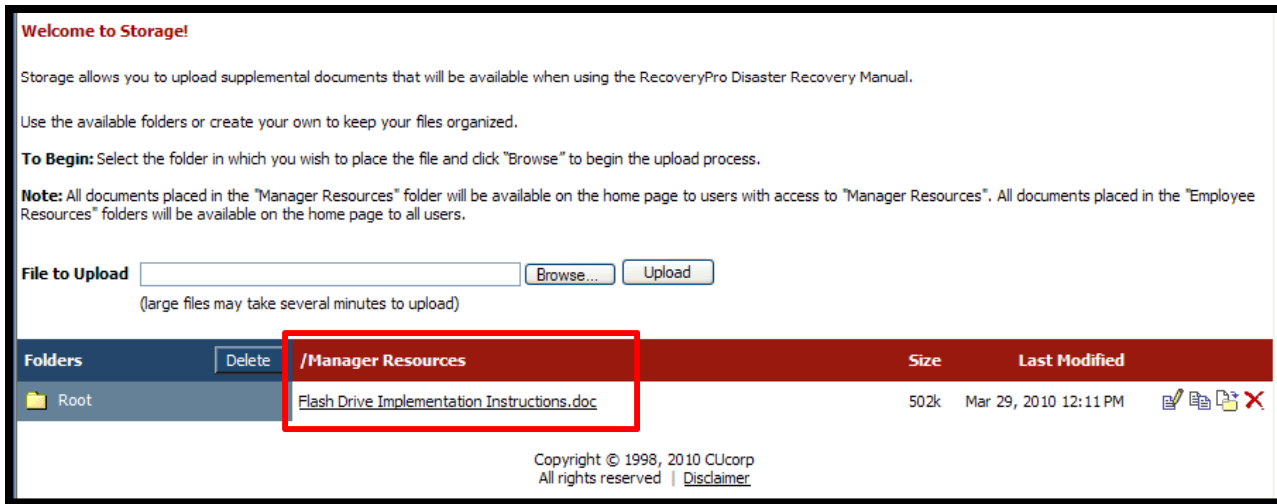


Note: If you see only “Root”, click on “Root” to expand the view to see all folders.

Storage

Viewing Files Already in Storage

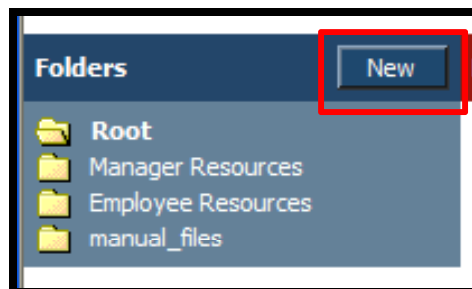
Click on the folder name and the contents of that folder will be displayed in the center section of the screen. If there are no contents, the center of the screen will be empty.



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.

Files placed in “Employee Resources” will be available to all users. Files placed in “Manager Resources” will be available to full admins.

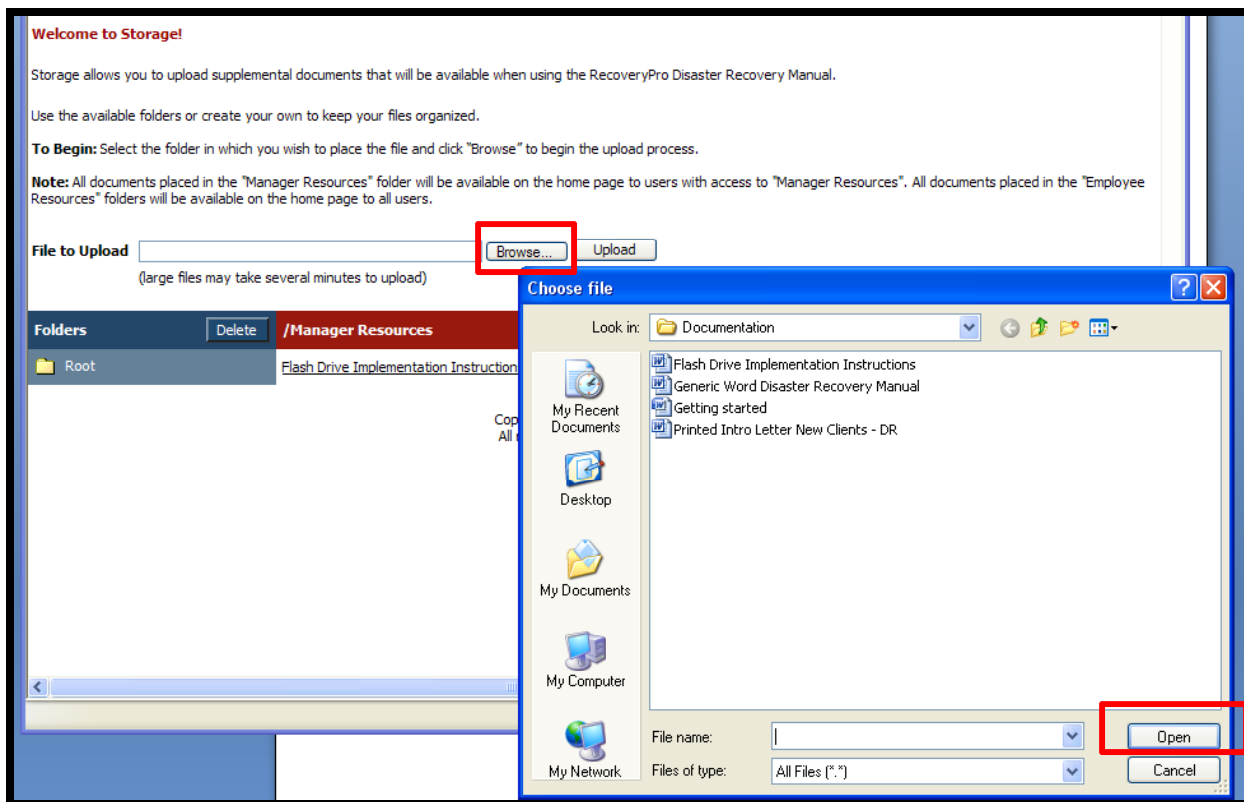
Additional folders can be created by clicking the “New” button next to the Folder listing. Only main folders can be created – you can not create sub-folders within top level folders. New folders are only available in the Storage area, and will not show on the home page.



Storage

Uploading Files to Storage

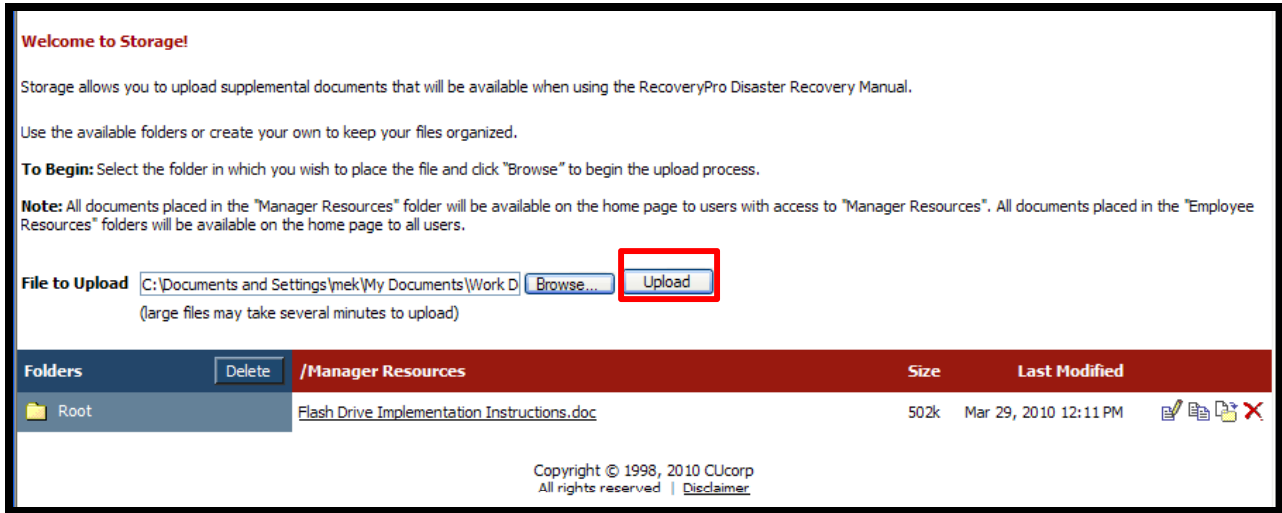
1. Choose the folder to which you want to upload your document.
2. To upload a document, click the “Browse” button next to the File Upload field. This will allow you to browse your computer hard drive or network to choose a file.
3. Once you’ve found the file, to upload, click on the file name, then click the “Open” button on the dialogue box.



Storage

Uploading Files to Storage (continued)

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



Welcome to Storage!

Storage allows you to upload supplemental documents that will be available when using the RecoveryPro Disaster Recovery Manual.

Use the available folders or create your own to keep your files organized.

To Begin: Select the folder in which you wish to place the file and click “Browse” to begin the upload process.

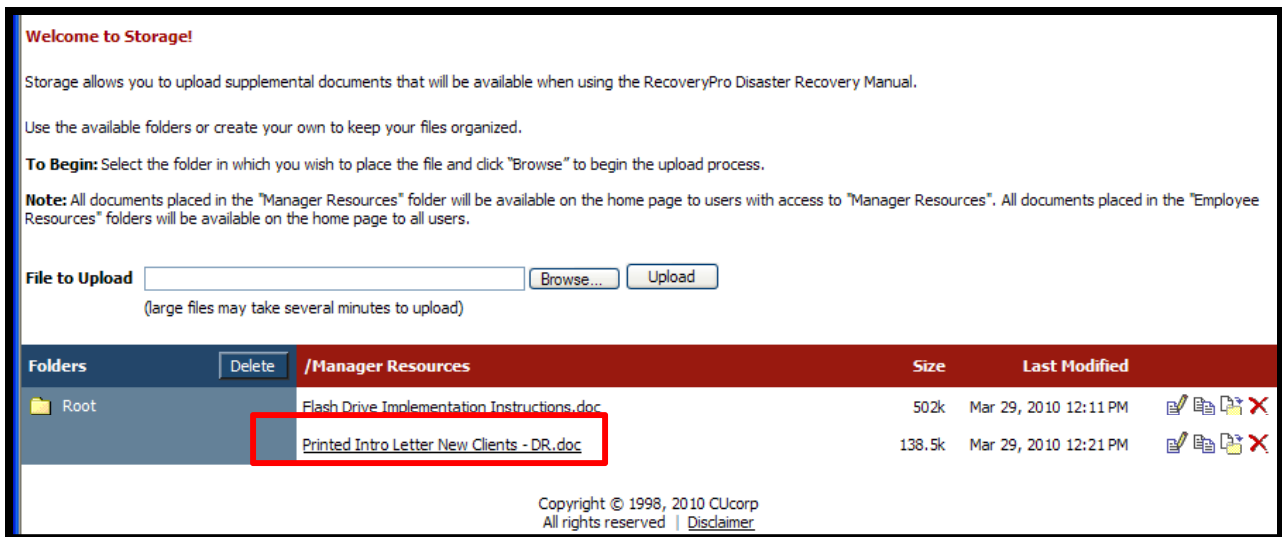
Note: All documents placed in the “Manager Resources” folder will be available on the home page to users with access to “Manager Resources”. All documents placed in the “Employee Resources” folders will be available on the home page to all users.

File to Upload C:\Documents and Settings\mek\My Documents\Work D

(large files may take several minutes to upload)

Folders	Delete	/Manager Resources	Size	Last Modified
Root		Flash Drive Implementation Instructions.doc	502k	Mar 29, 2010 12:11 PM

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All rights reserved | [Disclaimer](#)



Welcome to Storage!

Storage allows you to upload supplemental documents that will be available when using the RecoveryPro Disaster Recovery Manual.

Use the available folders or create your own to keep your files organized.

To Begin: Select the folder in which you wish to place the file and click “Browse” to begin the upload process.

Note: All documents placed in the “Manager Resources” folder will be available on the home page to users with access to “Manager Resources”. All documents placed in the “Employee Resources” folders will be available on the home page to all users.

File to Upload

(large files may take several minutes to upload)

Folders	Delete	/Manager Resources	Size	Last Modified
Root		Flash Drive Implementation Instructions.doc	502k	Mar 29, 2010 12:11 PM
		Printed Intro Letter New Clients - DR.doc	138.5k	Mar 29, 2010 12:21 PM

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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 moving the flash drive to different computers.

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 originally created.

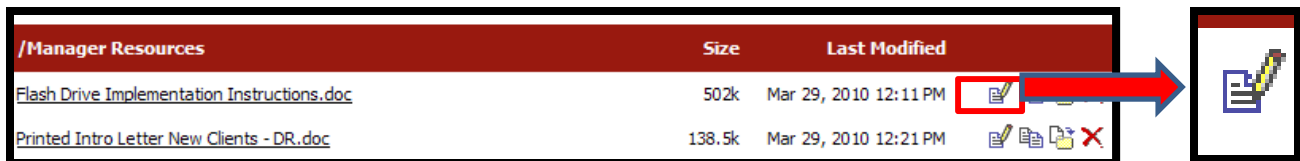
Making Changes to Files in Storage

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*.

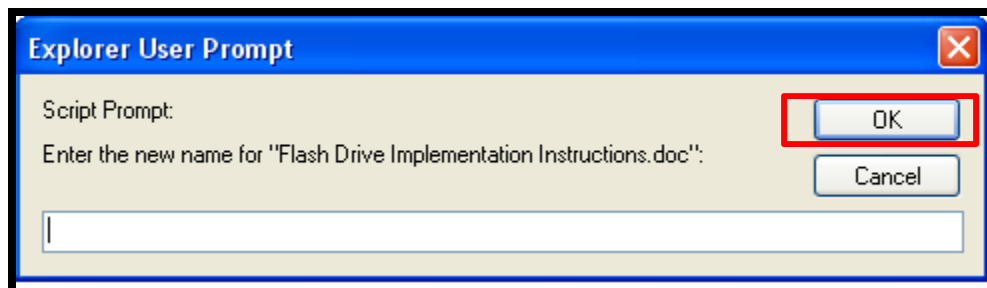
Files within the Storage area can be renamed, copied, moved to a different folder or deleted.

Renaming Files in Storage

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



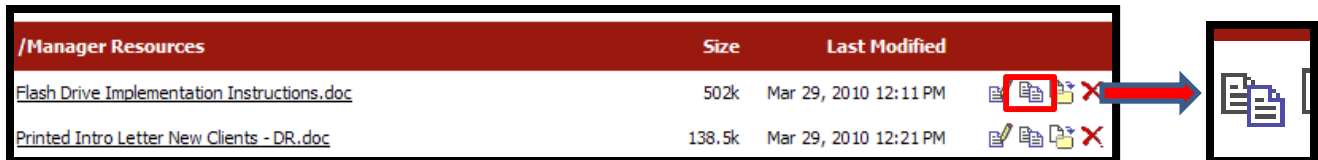
2. A dialogue box will open to allow you to rename the file. Enter the new name and click “OK”. **At the end of the file name, you *must* add the file type extension (i.e. .pdf or .doc, etc)** so the system knows what program to use to open the file.



Storage

Copying files in Storage

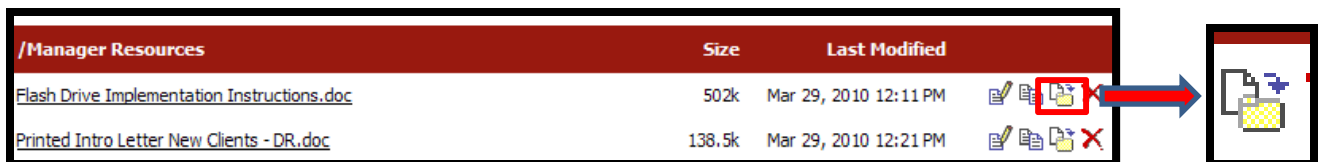
1. To create a copy of a document within the Storage area, click the “Copy” icon to the far right of the file name.



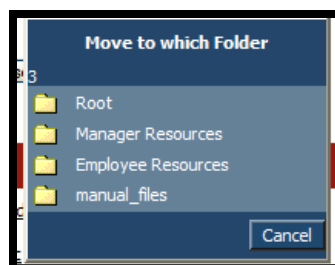
2. This will create a copy of the file, named “Copy of (file name)”. You can then rename or move this file, if desired.

Moving files between folders in Storage

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



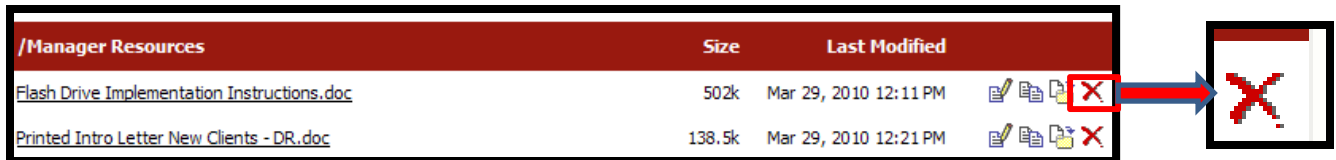
2. A dialogue box will open showing all available folders.
3. Click the name of the folder where you want the document to move. This will move the document to that folder. Remember, any documents placed in the “Employee Resources” or the “Manager Resources” folders will be available on the Home Page.



Storage

Deleting files in Storage

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



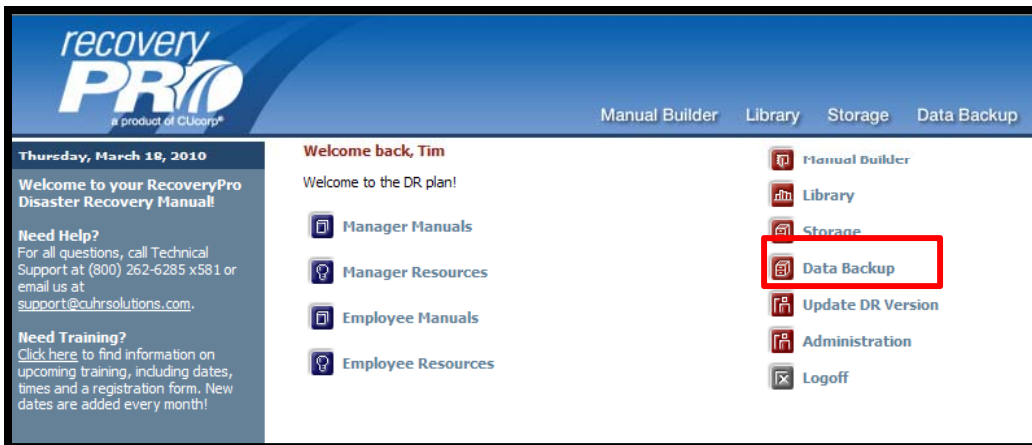
2. This will permanently delete the document from the Storage area. If this document is deleted from the “Employee Resources” or the “Manager Resources” folders, it will no longer appear on the home page.

NOTE: Files uploaded in the Storage area will *NOT* be included in the Backup files of the Disaster Recovery Manual.

Data Backup

Accessing the Data Back Up Function

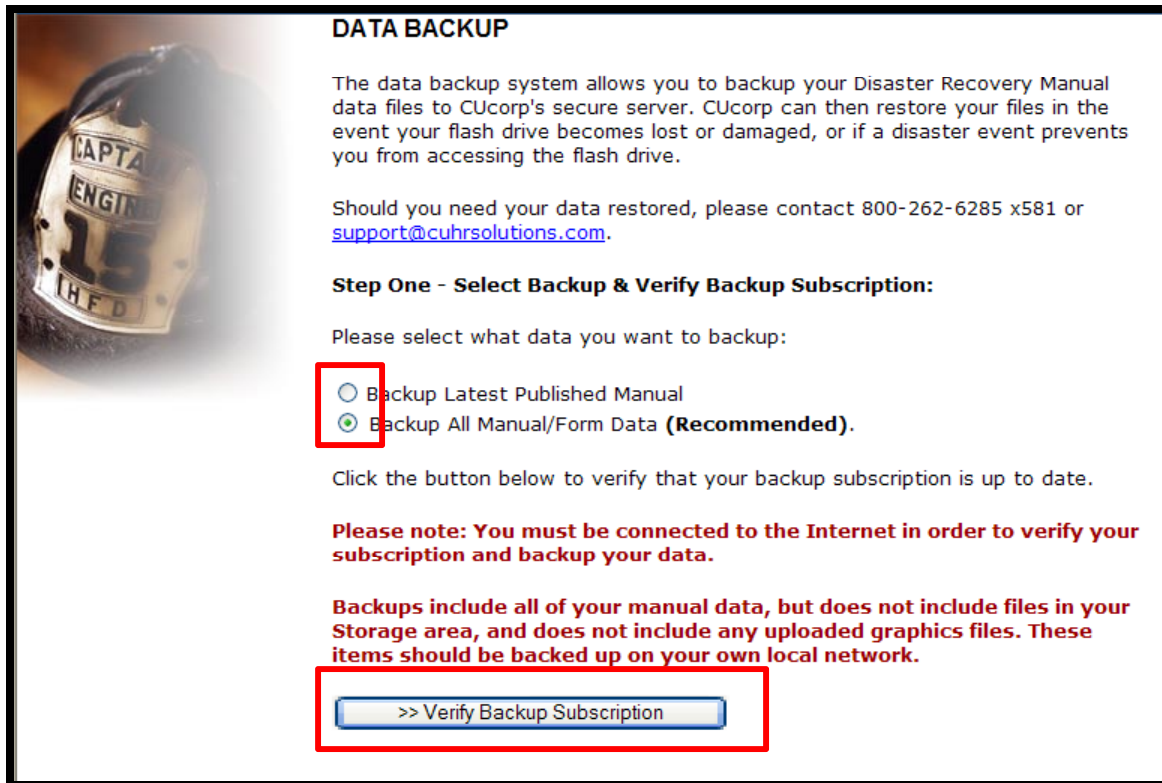
Click on “Data Backup” in the right hand navigation of the *Home Page* to access the Data Back Up function. The data backup system allows you to backup your Disaster Recovery Manual data files to CUcorp's secure server. CUcorp can then restore your files in the event your flash drive becomes lost or damaged, or if a disaster event prevents you from accessing the flash drive.



Data Backup

Backing up your Data

1. Choose whether you want to back up the latest published manual, or all the manual and form data and click on the corresponding radio button.
 - Backing up the latest published manual will back up the document.
 - Backing up all the manual and form data will back up your raw data files.
 - To back up both, you must go through this process twice.
 - If you only have time to back up one, it is recommended to back up the manual and form data.
2. Click on the “Verify Back Subscription” button



DATA BACKUP

The data backup system allows you to backup your Disaster Recovery Manual data files to CUcorp's secure server. CUcorp can then restore your files in the event your flash drive becomes lost or damaged, or if a disaster event prevents you from accessing the flash drive.

Should you need your data restored, please contact 800-262-6285 x581 or support@cuhrsolutions.com.

Step One - Select Backup & Verify Backup Subscription:

Please select what data you want to backup:

Backup Latest Published Manual

Backup All Manual/Form Data (**Recommended**).

Click the button below to verify that your backup subscription is up to date.

Please note: You must be connected to the Internet in order to verify your subscription and backup your data.

Backups include all of your manual data, but does not include files in your Storage area, and does not include any uploaded graphics files. These items should be backed up on your own local network.

Data Backup

Backing up your Data (continued)

3. Click on the “STEP TWO >> Click here to back up your DR Data” button. This will prepare the file that will be backed up.

DATA BACKUP

The data backup system allows you to backup your Disaster Recovery Manual data files to CUcorp's secure server. CUcorp can then restore your files in the event your flash drive becomes lost or damaged, or if a disaster event prevents you from accessing the flash drive.

Should you need your data restored, please contact 800-262-6285 x581 or support@cuhrsolutions.com.

Step Two - Backup your data:

Click button below to backup your DR data in a local text file.

STEP TWO >> Click here to backup your DR Data

4. The system will indicate which file needs to be uploaded to the CUcorp servers. The correct file path will be listed in **RED**. This file path must be entered into the Upload Field. This can be accomplished either by:
 1. Highlighting and Copying the entire path and file name into the BROWSE field OR
 2. Clicking the BROWSE button and using listed file name below in red to help find the file. It will be found in the root of the flash drive in a folder titled BACKUP. Double click the correct file to add it to the BROWSE field.

To send to our storage system:

2. Click STEP THREE button to upload the file to storage system.

F:\\BACKUPS\\23.htm

Browse...

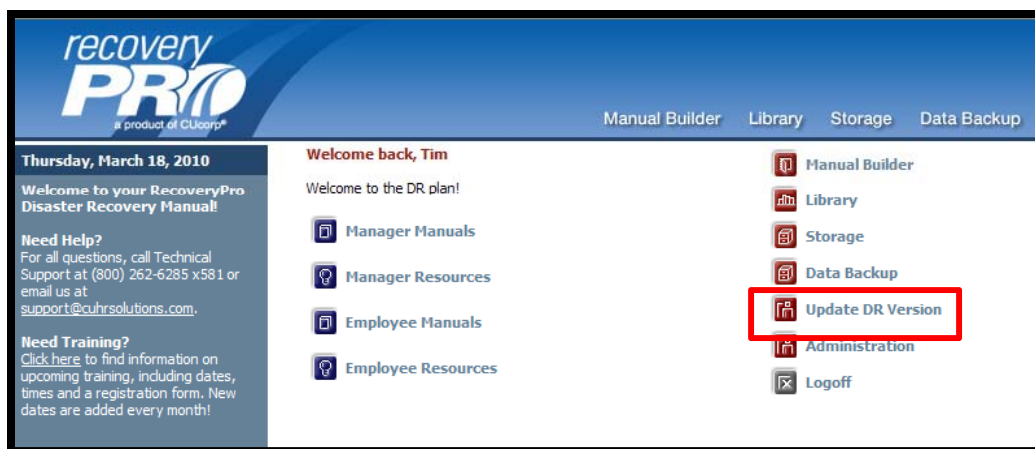
STEP THREE >> Click here to upload the data file

BROWSE button

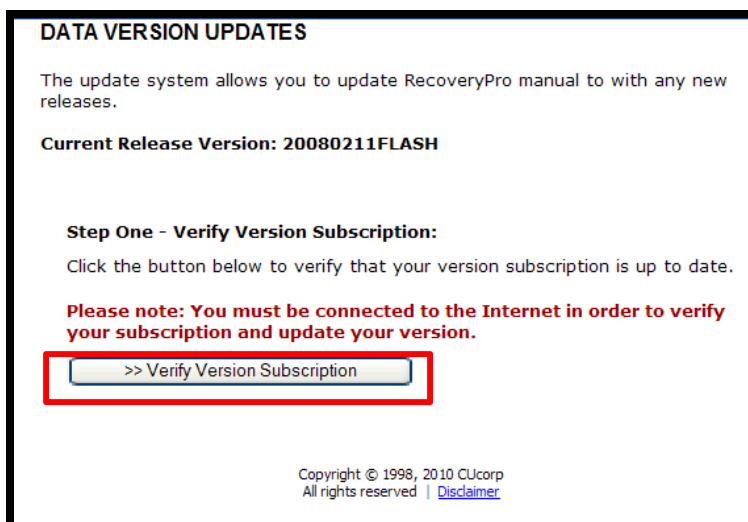
Updating DR Version

Updating your DR Version

1. Click on “Update DR Version” in the right hand navigation of the *Home Page* to access the Update DR Version function. This function allows you bring in any recent updates for the manual to your DR manual. **Note: Updates will always be communicated by email as well.**



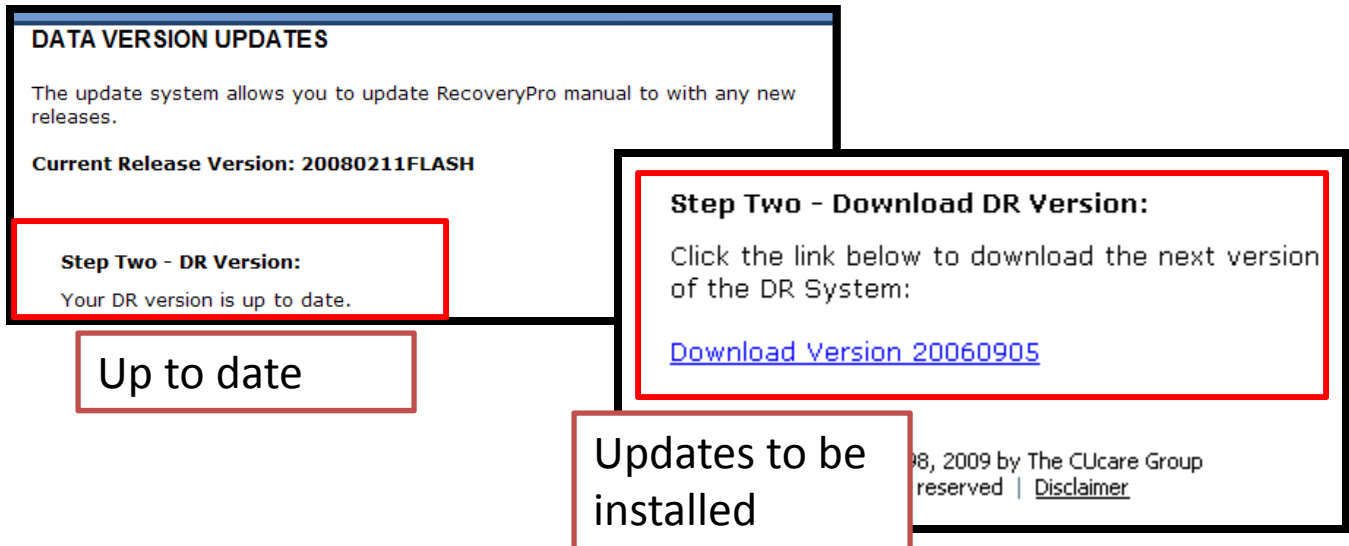
2. Click the “Verify Version Subscription” button



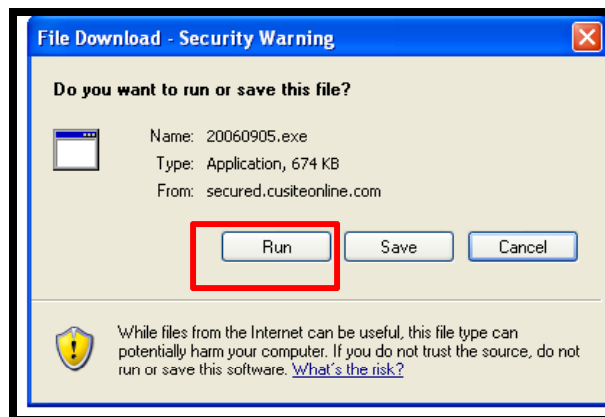
Updating DR Version

Updating your DR Version (continued)

3. A message will appear to tell you if your version is up to date or if there are updates to be installed.



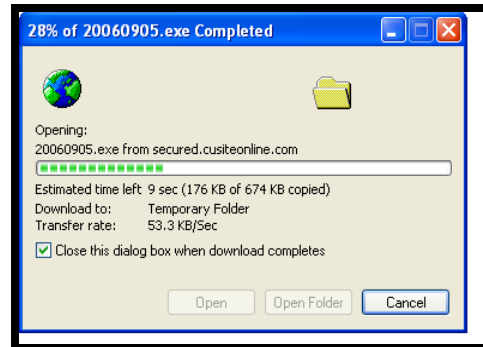
4. If there is an update to be installed, click the link to initiate the download.
5. A pop up dialog box will appear.
6. Click the RUN button to begin the download. This will extract the file for the update.



Updating DR Version

Updating your DR Version (continued)

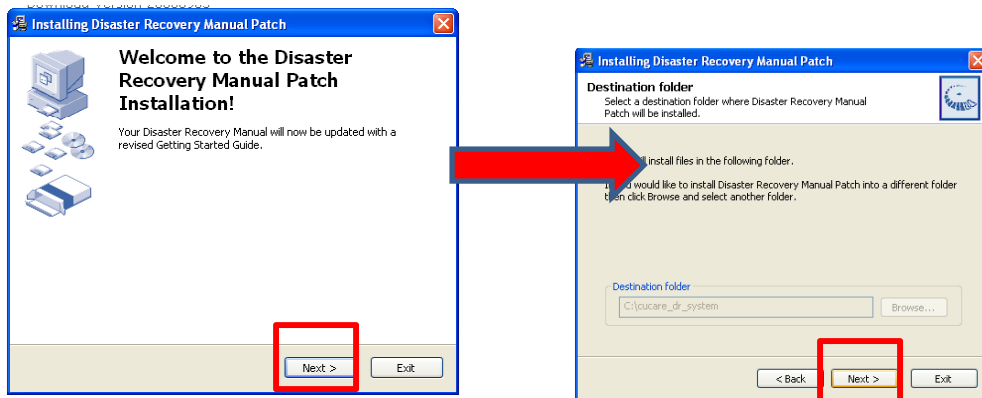
7. Be patient as the update file opens....



8. Depending on your security settings, you may be asked to verify if you want to run this update. Click RUN



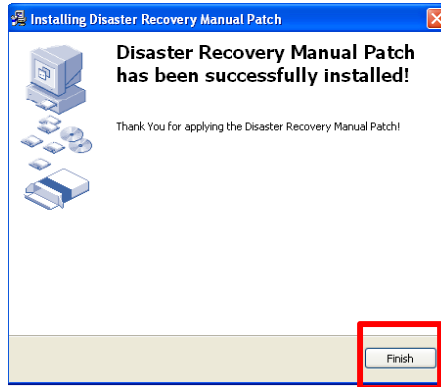
9. Follow the prompts as the updates are installed. Click NEXT at each prompt.



Updating DR Version

Updating your DR Version (continued)

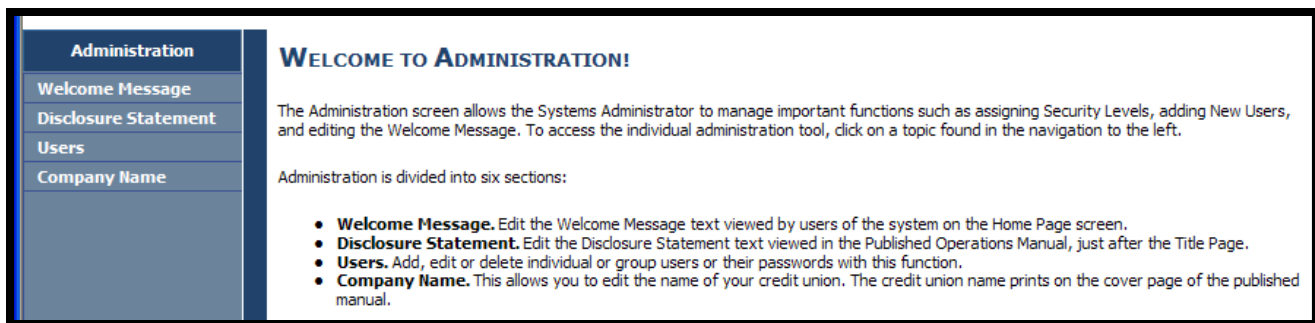
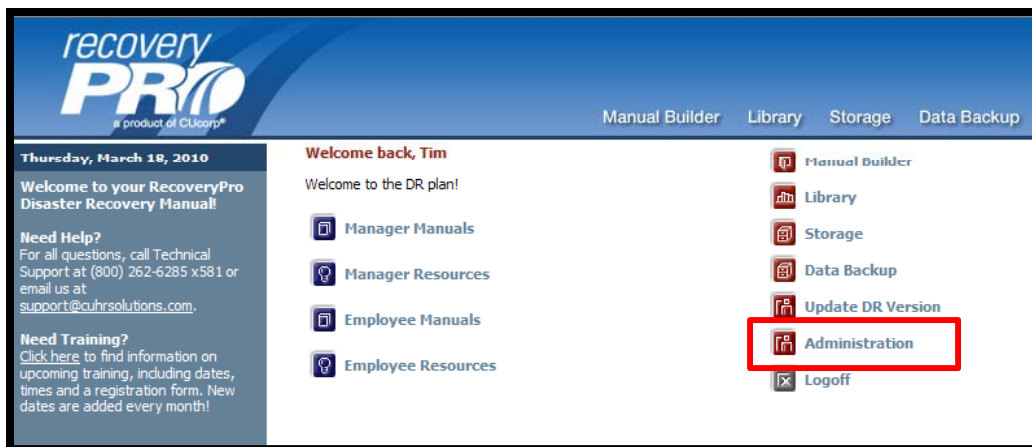
10. A notification will tell you when this update installation is complete. Click FINISH.



Administration

Accessing Administration

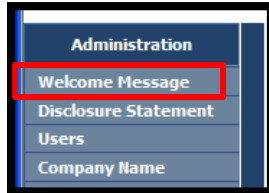
1. Click on “Administration” in the right hand navigation of the *Home Page* to access the *Administration Area*. The *Administration Area* allows you to manage several functions, including the managing users, adding a Welcome Message to the *Home Page*, adding a disclosure to your published manual, and updating your company name.



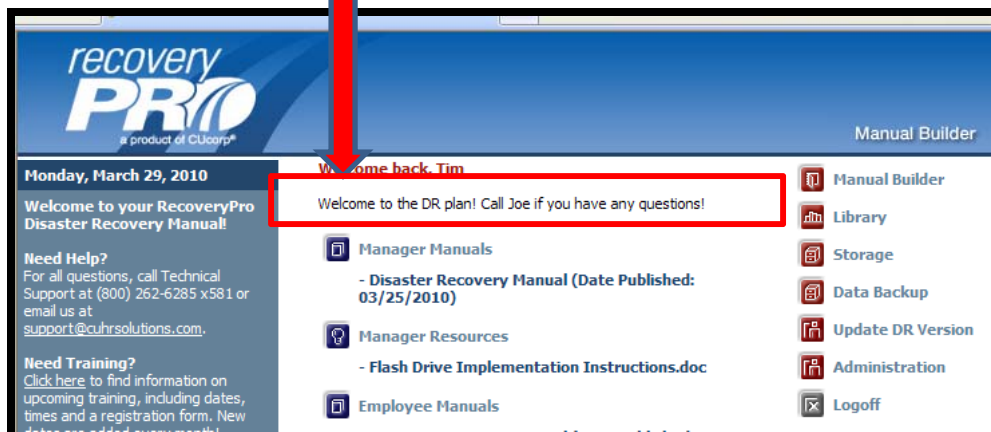
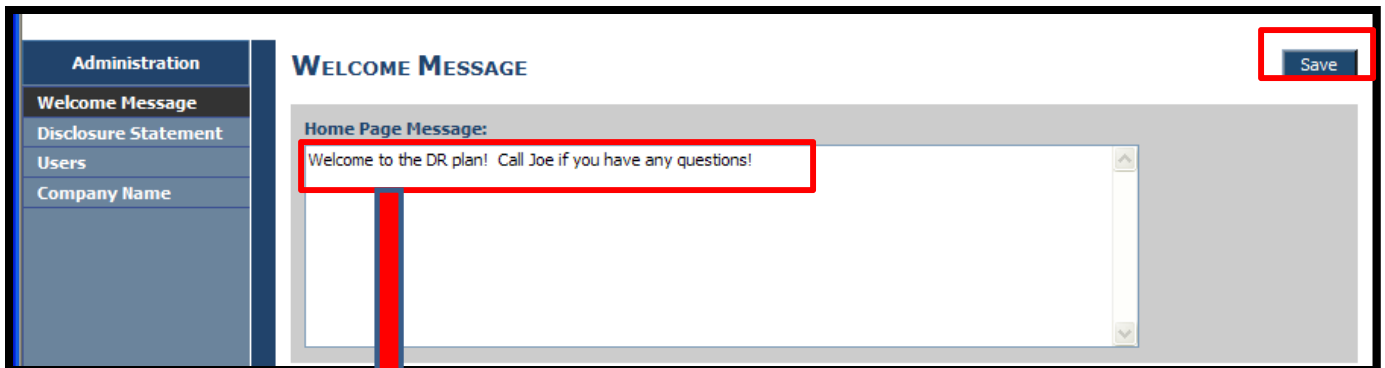
Administration

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.
3. Click “Save” when done.

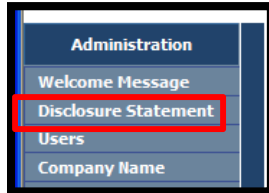


4. This message will now appear on the Home Page

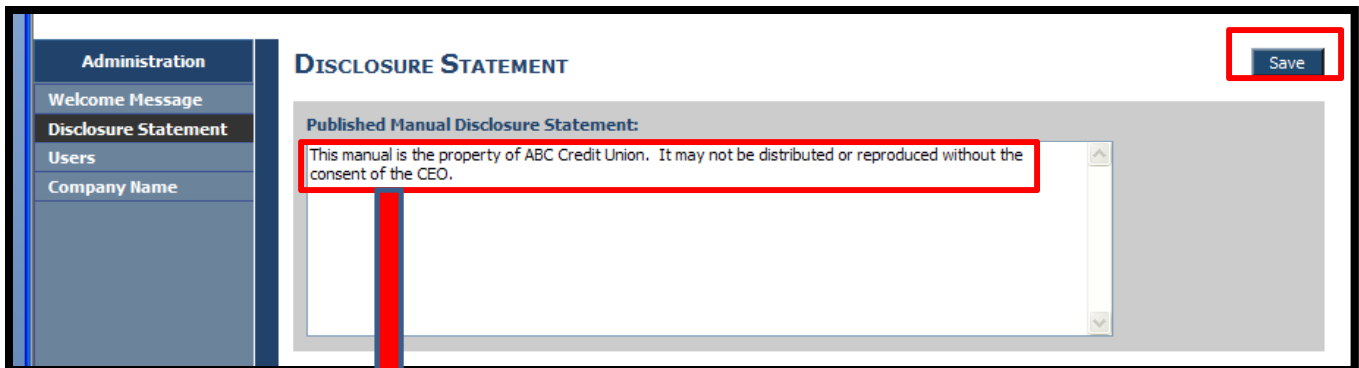
Administration

Adding a Disclosure to the Published Manual

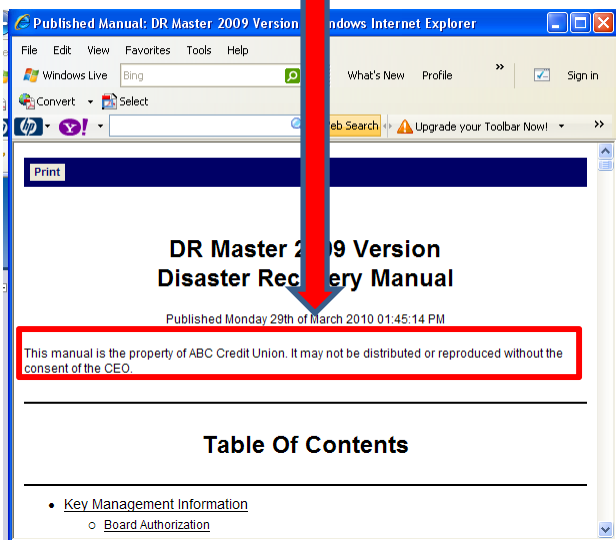
1. Click on the “Disclosure Statement” button on the left navigation.



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



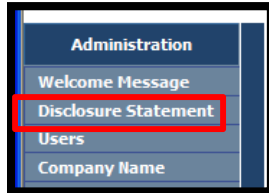
4. This message will now appear on the in the Published Manual, on the page between the Title and the Table of Contents.



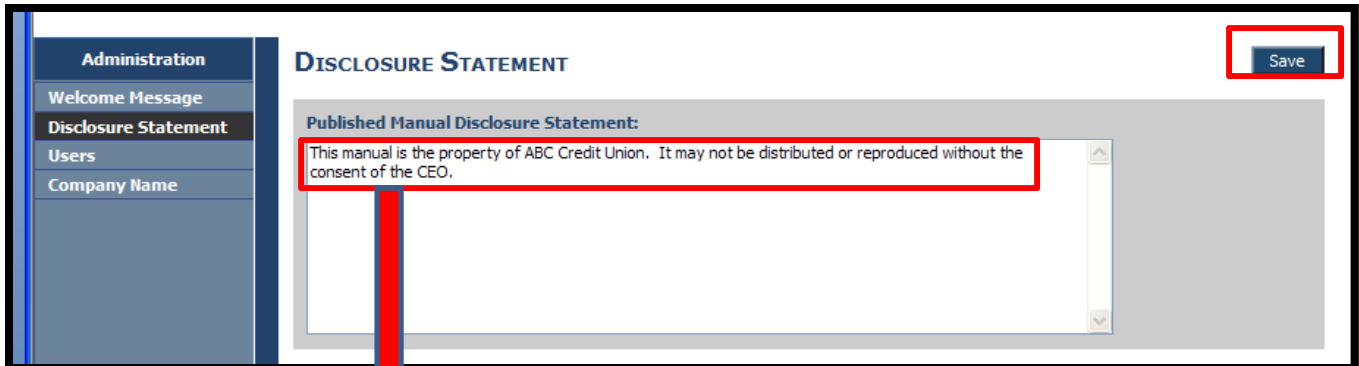
Administration

Adding a Disclosure to the Published Manual

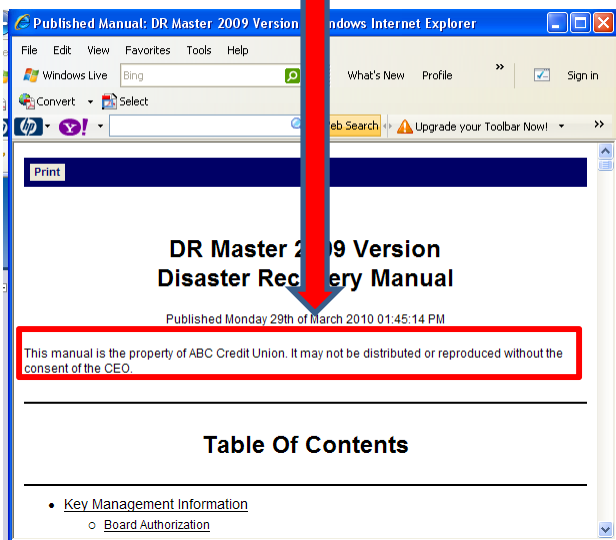
1. Click on the “Disclosure Statement” button on the left navigation.



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



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



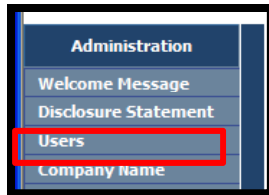
Administration

Adding New Users

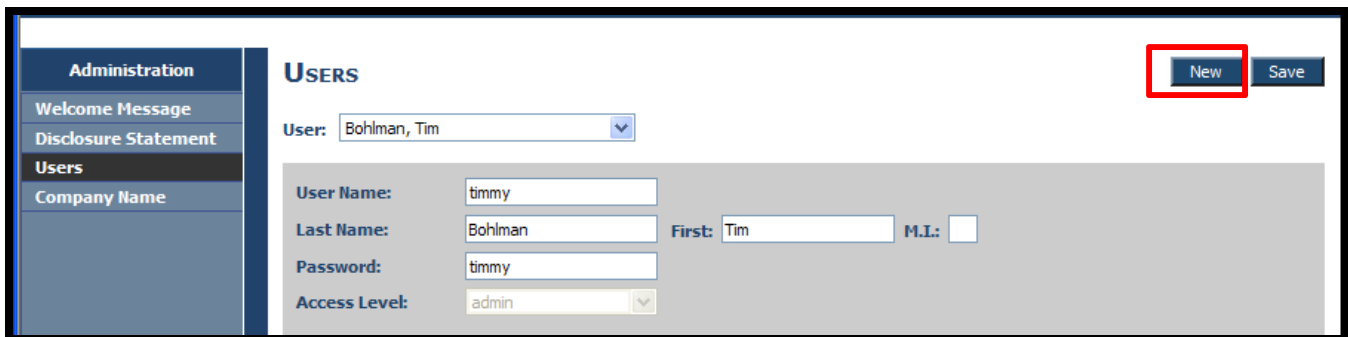
Two types of users can be created: Individual or Group Users.

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)

1. To add a new user, click on the “Users” button on the left navigation.



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

A screenshot of the 'USERS' management interface. On the left is a navigation menu with 'Users' selected. The main area is titled 'USERS' and contains a dropdown menu for 'User' (currently showing 'Bohlman, Tim'). Below this are input fields for 'User Name' (timmy), 'Last Name' (Bohlman), 'First' (Tim), 'M.I.' (empty), 'Password' (timmy), and 'Access Level' (admin). On the far right, there are two buttons: 'New' and 'Save'. The 'New' button is highlighted with a red rectangular box.

4. This will bring up a blank “New User” form.

Administration

Adding New Users (continued)

5. For either an Individual or Group User, type in the First and Last Name (or Group Name for Group Users), the User ID, and Password. From the dropdown list, choose the Access Level this user will have.
6. When you're finished, click the "Save" button.

Administration

Welcome Message

Disclosure Statement

Users

Company Name

NEW USER UserCount=4, MaxUsers=100

Save Cancel

Create Individual User Login Create Group User Login

Last Name: Smith First: Jonathan M.I.:

User Name: jonsmith@abccu.com

Password: Smitty58

Access Level: employee

admin

employee

Individual User - This option allows you to assign each employee a unique user name and password. We recommend using their E-mail address as the user name.

Editing or Deleting Users

1. Go to the "Users" tab and bring up the list of current users. Use the dropdown list to view individual user information.
2. 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.
3. To delete a user, click the "Delete" button. This will permanently delete this user.

Administration

Welcome Message

Disclosure Statement

Users

Company Name

USERS New Delete Save

User: Smith, Jonathan

User Name: jonsmith@abccu.com

Last Name: Smith First: Jonathan M.I.:

Password: Smitty58

Access Level: employee

Administration

Editing Company Name

Your credit union company name prints on the title page of the published manual. If your credit union name changes, use the “Company Name” function to update your company name.

1. Click on the “Company Name” link on the left navigation.

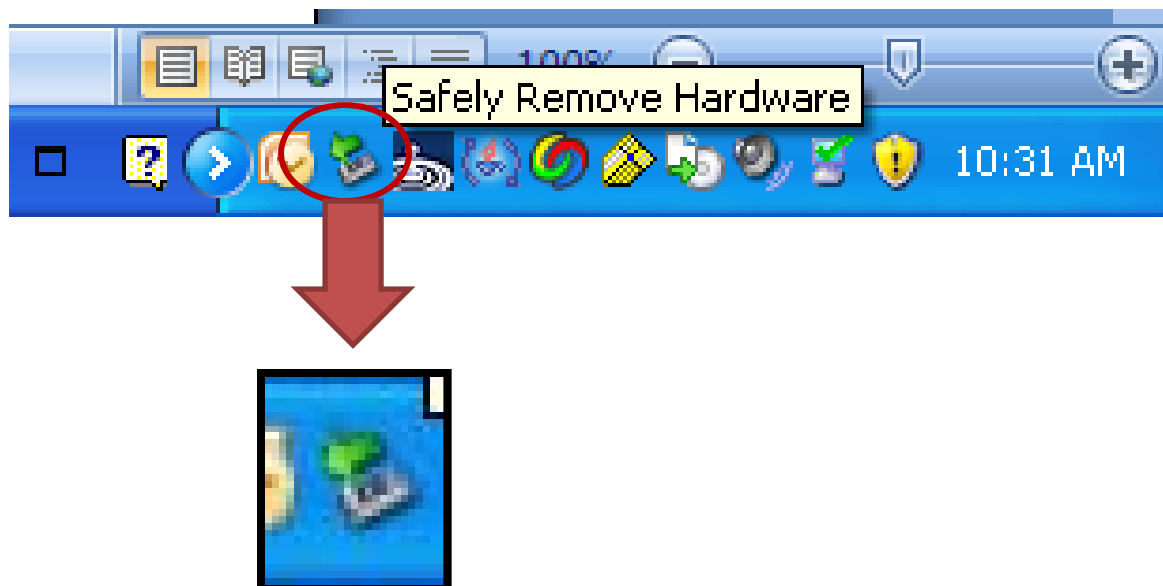


2. Edit your company name and click SAVE.
3. All future published versions of your manual will have the updated name on the title page.



Removing the Flash Drive

1. Before removing the flash drive, log out of the Disaster Recovery Manual and close any windows associated with it.
2. In the lower left side of your monitor, use the “Safely Remove Hardware” icon before removing the flash drive.



TIP : Be careful when inserting or removing the flash drive – some of the older versions issued have a small switch on the side that allows the flash drive to be “locked”. This switch can sometimes be moved in the course of inserting or removing the flash drive. The flash drive must be in the “unlocked” position in order for your data to be saved.

This applies to those flash drives with the removable cap. Those with the “swivel” version do not have the lock/unlock switch.

Appendix A

More information on helpful documents in the RecoveryPro Library (in the TOOLS section)

The Implementation Guide

This Guide is found within the manual builder area as well, in an online format. The library provides a printable version. This document guides you through each of the phases of developing your plan. It's rather long, but don't let that discourage you! This guide will help you with:

- Determining the scope of your plan.
- Guiding you through basic information gathering - insurance information, vendor/partner information, etc. Most credit unions have these things in place, but don't have the information readily available in one spot, so when a disaster occurs, they cannot quickly determine who to call to help with recovery efforts
- Guiding you through what information needs to be assembled for technology recovery, facilities recovery, and personnel recovery. Again, many credit unions have contingency plans or procedures in place, but do not have the information well documented or all in one spot
- It will give you information on how to prepare for communication with staff, media and the public should a disaster occur
- It will give you information on testing, adjusting your plan, etc.

RecoveryPro Content Guide

This document guides you through some of the key areas with the RecoveryPro Manual that you will need to customize. The first half goes through some of the actual sections of text within the working manual, and the second half of it goes through the forms in the manual. As you fill out the forms, the information you enter will populate in the working manual in the appropriate spot.

RecoveryPro Suggested Steps

This document provides an overview of the steps necessary to build a business continuity plan.

Additional Library Tools may be added over time.

Appendix B

Image Property Settings

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 is inserted, right click on the image and choose “Image Properties”.

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

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

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

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

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

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

Align: This aligns the photo relative to the text. Generally “Left” or “Right” create the best look on a printed page. If there is no text with your image, this setting can be left blank.

Appendix C

Table Property Settings

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.

Appendix D

Form Listing with Corresponding Working Manual Section Reference

Vital Employee Information

- “*Vital Employee Information*” page, in the “*Human Resources*” section and on the “*Employee & Officials Directory*” page, in the “*Key Reference Information*” section.

Key Media Contacts

- “*Key Media Contacts*” page, in the “*Public Relations*” section.

Global Situation Assessment

- “*Global Assessment*” page, in the “*Situation Assessment*” section.

Key Business Function Analysis

- “*Disaster Recovery Strategy*” page, in the “*Key Management Information*” section.

Testing Evaluation Form

- “*Disaster Recovery Strategy*” page, in the “*Key Management Information*” section.

Facility Analysis

- “*Priority I Facilities*”, “*Priority II Facilities*” and “*Priority III Facilities*” pages, in the “*Facilities Recovery Procedures*” section.

Recovery Foundation Report Card

- “*Disaster Recovery Strategy*” page, in the “*Key Management Information*” section.

Disaster/Risk Analysis Worksheet: Natural Disasters

- “*Scope of Plan*” page, in the “*Key Management Information*” section.

Disaster/Risk Analysis Worksheet: Human Failures

- “*Scope of Plan*” page, in the “*Key Management Information*” section.

Disaster/Risk Analysis Worksheet: Mechanical Failures

- “*Scope of Plan*” page, in the “*Key Management Information*” section.

Appendix D

Form Listing with Corresponding Working Manual Section Reference (continued)

Software Inventory

- “*Computer System Recovery Procedures*” page, in the “*Technology Recovery Procedures*” section.

Facilities Vendor Directory

- “*Facilities Vendor Directory*” page, in the “*Facilities Recovery Procedures*” section.

Technology Vendor Directory

- “*Technology Vendor Directory*” page, in the “*Technology Recovery Procedures*” section.

Data Circuit List

- “*Network Recovery Procedures*” page, in the “*Technology Recovery Procedures*” section.

Disaster Management Team Members

- “*Disaster Management Team*” page, in the “*Key Management Information*” section.

Site Specific Situation Assessment

- “*Site Specific Assessments*” page, in the “*Situation Assessment*” section.

Records Retention Log

- “*Copies of Key Documents & Contracts*” page, in the “*Key Reference Information*” section.

Disaster Planning Project Team

- “*Disaster Management Team*” page, in the “*Key Management Information*” section.

Media Inquiry Log

- “*Public Relations Fundamentals*” page, in the “*Public Relations*” section.

Appendix D

Form Listing with Corresponding Working Manual Section Reference (continued)

Voice Circuit List

- “*Telephone Recovery Procedures*” page, in the “*Technology Recovery Procedures*” section.

Information Systems Backup Log

- “*Implementation of Technology Backup Plans*” page, in the “*Declaration of Disaster*” section.

Insurance And Funding Directory

- “*Insurance & Funding*” page, which is the first (main) page in the “*Insurance & Funding*” section.

Credit Union Officials

- “*Employee & Officials Directory*” page, in the “*Key Reference Information*” section.

Emergency Services Vendor Directory

- “*Emergency Telephone List*” page, in the “*Key Reference Information*” section.

Business Function Recovery Team

- “*Priority I Functions & Recovery Procedures*” page, in the “*Key Business Function Recovery Procedures*” section.

Appendix E – Printing Tips

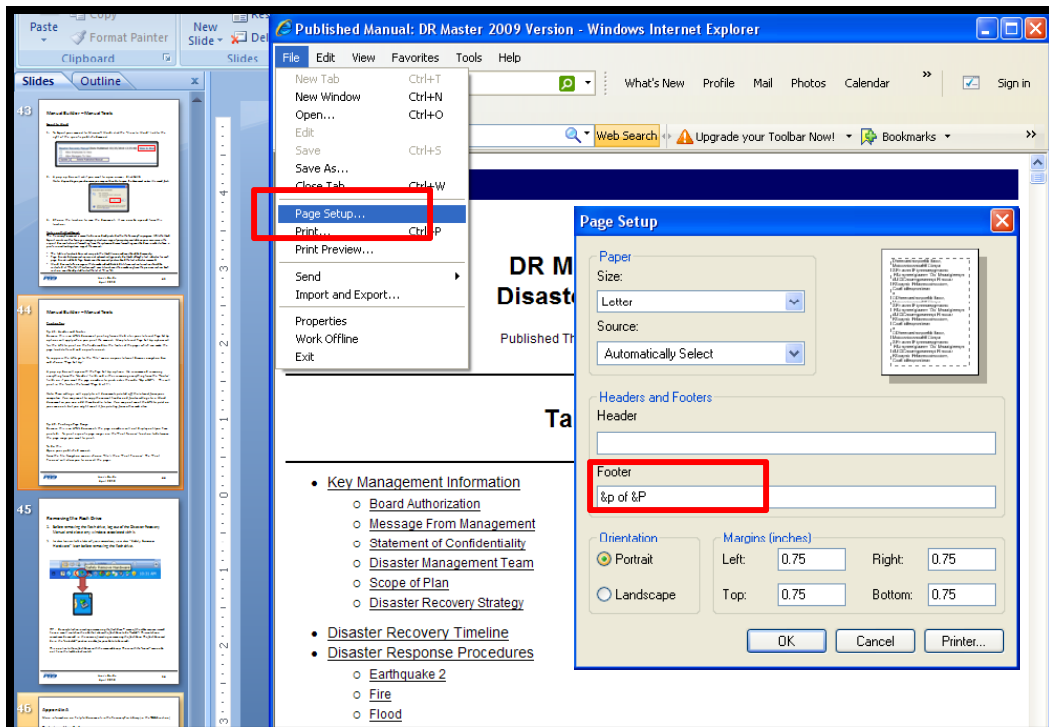
Printing Tip #1: Header and Footer

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. We recommend removing 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 F 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.

Appendix E – Printing Tips

Tip #2: Printing a Page Range

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 F – 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.	1/1/1900
&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 Disaster 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