



Tutorial

How to incorporate the Master updates
into your Working Manual

Updating Your Working Manual

It is important to note that when updates are made to the Master Manual, these updates ***do not automatically go into your Working Manual.***

We do not want to take the chance of overwriting your content, or putting in content that may not apply to your credit union.

- You must update your own Working Manual in order to include the updates.
- If a particular update does not apply to your credit union, you do not have to include the update.
- If you have not customized a particular policy, you can simply remove the old policy, and bring in the updated policy. This document will show you how to do this.

Updating Your Working Manual

There may be policies that you want to update, but you have already customized for your credit union. For these policies, you need to make a decision:

A. Use the Tracked Changes documents from the library as a guide to incorporate the new changes into your existing customized policies

B. Archive your customized policies, bring in the revised policy in its entirety, then re-customize it with your credit union information

Which way you decide will depend on how many revisions the policy has, and how much customization you have already done. If a large revision was made, it may be easier to bring in the revised policy in its entirety, then re-customize it with your credit union information than trying to incorporate all the changes to your existing policy

The following tutorial demonstrates how to remove an old policy, and completely replace it with the updated policy from the Master.

Updating Your Working Manual

There are three basic steps to bringing in the updated policies in their entirety:

1. Archive (if necessary) the previous version of the policy
2. Remove the previous version of the policy from the Working manual
3. Bring in the updated/new policy from the Master manual to the Working manual

Note : If you are bringing in a brand new policy, skip steps #1 and #2

Step 1. Archive (if necessary) the previous version of the policy

- Open the *Manual Section Management* folder, then click on the “Multi-Archive Utility”
- 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.

The screenshot shows the 'Multi-Archive Utility' page in a web browser. The left sidebar contains a tree view with 'Multi-Archive Utility' selected and highlighted by a red box. A callout box on the left says 'Open the Multi-Archive function'. The main content area is titled 'Multi-Archive Utility' and contains a list of sections with checkboxes. A red box highlights the entire list area, with a callout box saying 'Check all policies to be archived'. A vertical scroll bar on the right has a red arrow pointing down, with a callout box saying 'Scroll down'. At the bottom of the page, a 'Copy Section(s) To Archive' button is highlighted with a red box, with a callout box above it saying 'End of the page'.

Open the Multi-Archive function

Check all policies to be archived

Scroll down

End of the page

Copy Section(s) To Archive

Step 2. Remove the previous version of the policy from the Working manual

- Open the *Manual Section Management* folder, then click on the “Multi-Delete Section Utility” link.
- 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 screenshot shows the 'Multi-Delete Section Utility' page in the CU policy PRO system. The page title is 'Multi-Delete Section Utility' and it includes a search bar for the working manual. A left-hand navigation menu is visible, with 'Multi-Delete Section Utility' highlighted. The main content area displays a list of policy sections with checkboxes. Two sections, '1235: Education & Volunteer Training Guidelines' and '1615: Privacy', are checked. A red box highlights the 'Multi-Delete Section Utility' link in the navigation menu, with an annotation 'Open the “Multi-Delete Section Utility” link'. Another red box highlights the list of sections, with an annotation 'Check all policies to be deleted'. A third red box highlights the 'Delete Selected Sections from Manual' button at the bottom of the page, with an annotation 'End of the page'. A vertical red arrow with the text 'Scroll down' indicates the direction to reach the button.

Open the “Multi-Delete Section” link

Check all policies to be deleted

End of the page

Scroll down

Delete Selected Sections from Manual

Step 3. Bring in the updated/new policy from the Master manual to the Working manual

- Open the *Manual Section Management* folder, then click on the “Multi-Add to Working from Master Utility” link
- 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* to your *Working Manual*.
- Scroll to the end of the page and click the “Add to Working from Master” button

Open the Multi-Add to Working from Master function

Check all policies to be added to working from the Master

Scroll down

End of the page

Add to Working from Master

The screenshot shows the CUQuality PRO interface. The left sidebar contains a navigation menu with the following items: MANUAL ADMINISTRATION, EDIT SECTIONS OF WORKING MANUAL, MANUAL SECTION MANAGEMENT (highlighted), Add Sections, Multi-Delete Section Utility, Multi-Do Not Publish Utility, Multi-Add to Working From Master Utility (highlighted with a red box), Multi-Key Fields Update, MANUAL TOOLS, REPORTS, and Update This Menu Tree. The main content area is titled 'Multi-Add to Working From Master Utility' and contains a search bar, a 'Select/Deselect All Sections' button, and a list of sections with checkboxes. The list includes sections 1000 through 1615, with '1235: Education & Volunteer Training Guidelines' and '1615: Privacy' checked. A red box highlights the entire list of sections. A red arrow points down from the text 'Scroll down'. At the bottom right, a red box highlights the 'Add to Working from Master' button. The text 'End of the page' is in a box above the button.