CU PolicyPro

USER'S GUIDE

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Table of Contents

Table of Contents (continued)

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 1-800-262-6285, ext 581 or e-mail us at support@cuhrsolutions.com.

Credit unions in **Pennsylvania** may contact 800-932-0661, Option #3 or policypro@pcua.coop.

Credit unions in **Massachusetts, New Hampshire, or Rhode Island** may contact 1-800-634-0612 or email complianceconnection@cucenter.org.

Credit unions in **North Carolina** may contact Kim Bohannon at 800.822.8859, or kbohannon@ncleague.org.

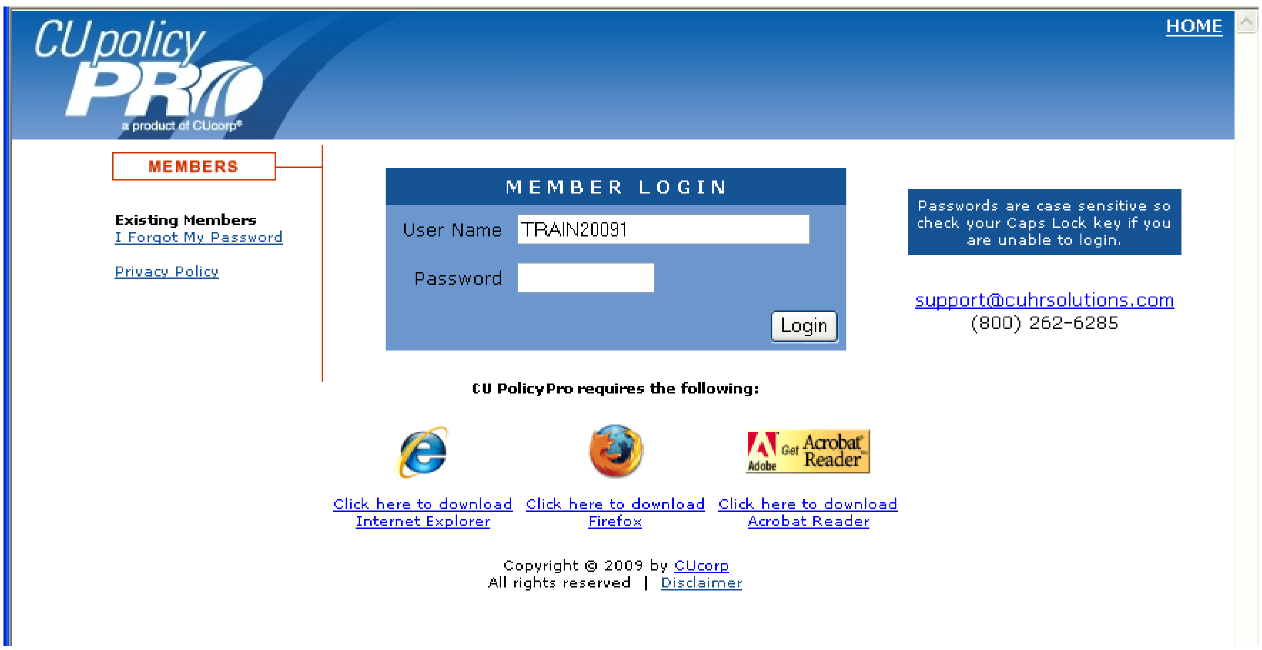
Good Luck!

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.



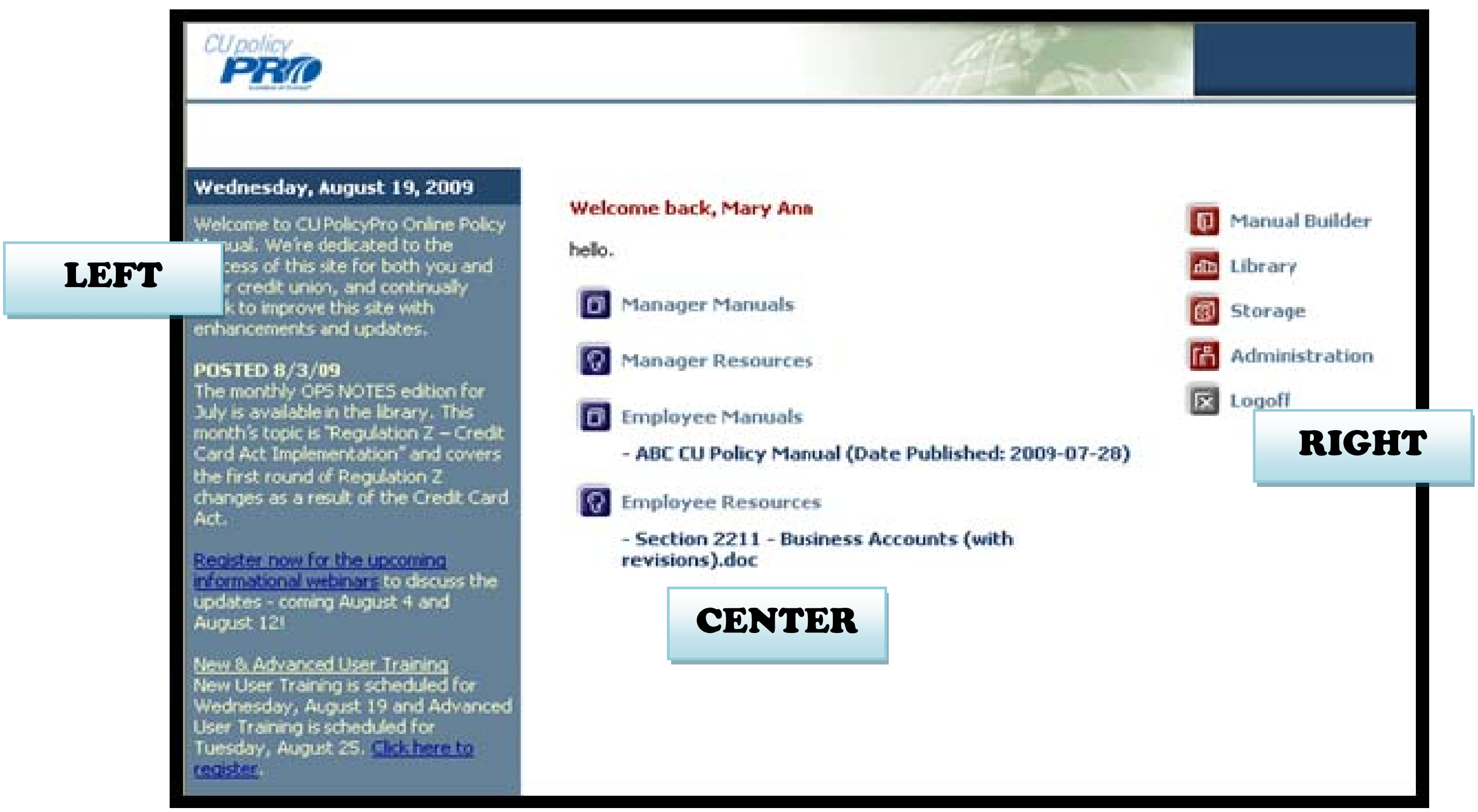
Getting Started – The Home Page

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.

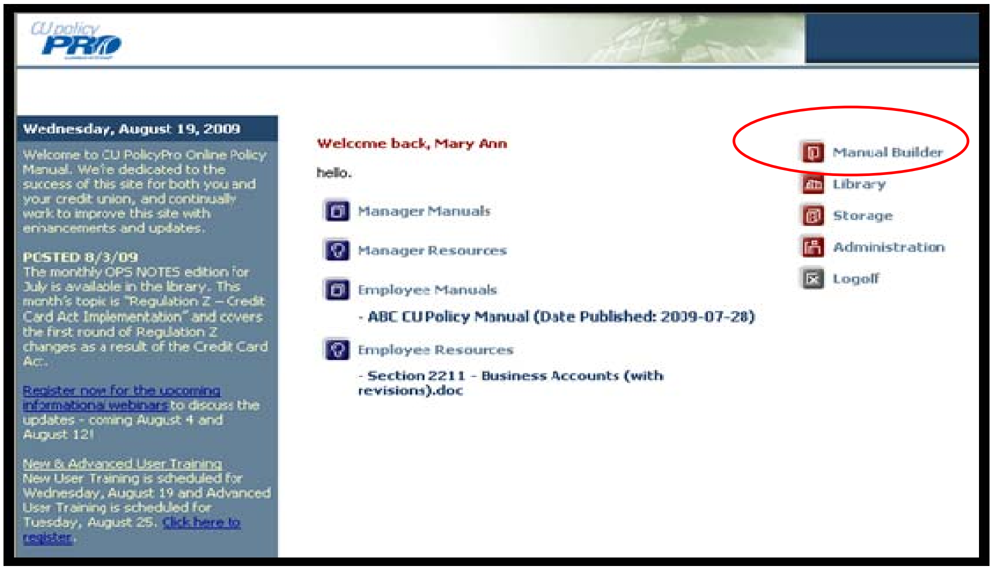
The **center area** of the screen provides a welcome message to the user, and any resources that have been posted by the credit union's administrator. Access to resources is determined by the user's login. "Manager Resources" and "Manager Manuals" are available to users with full administrative rights, 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 four navigation buttons.



Manual Builder – Opening Your Manual

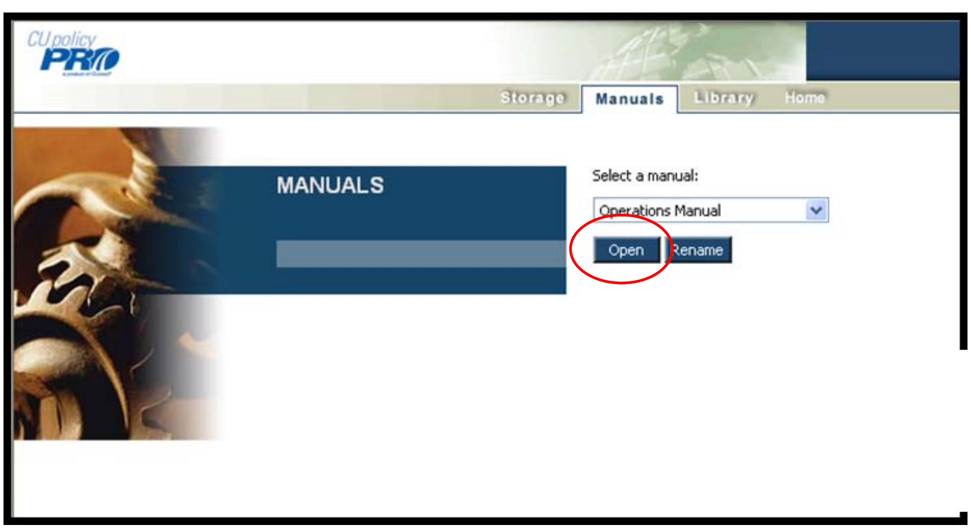
Click on "Manual Builder" in the right hand navigation to access your CU PolicyPro Operations Manual.



You will be brought to a screen that allows you to choose your manual. *Note: Only in a rare instance will a credit union have more than one manual. For most credit unions, there is no selection process.*

On this screen you can also rename your manual, if desired.

Click the *Open* button to access your manual.



Manual Builder – The Working Manual

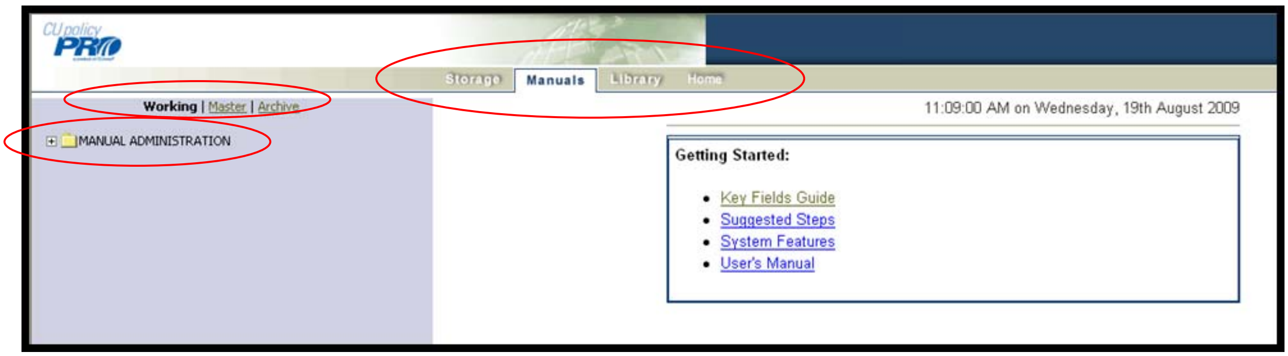
Opening your manual brings you to the *Working Manual*.

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 40 and 41.

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.



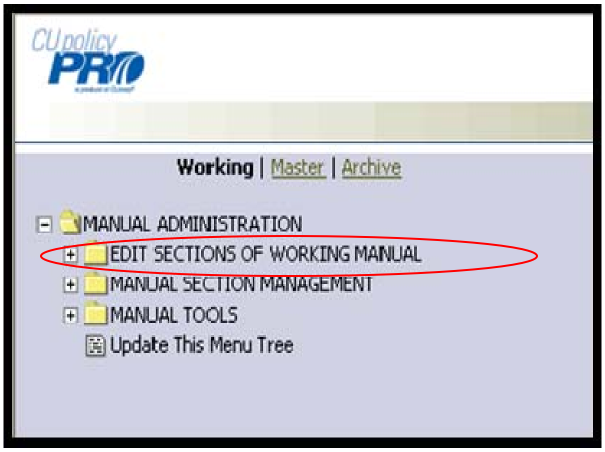
Manual Builder – The Working Manual

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.

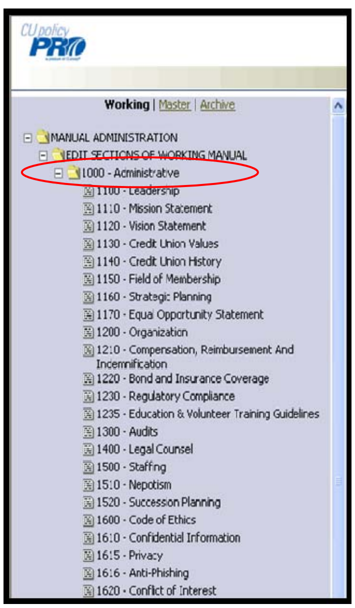
Tip: clicking on the folder icon itself will not expand or contract the folder – you must click on the folder name or the plus/minus sign next to it.

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.



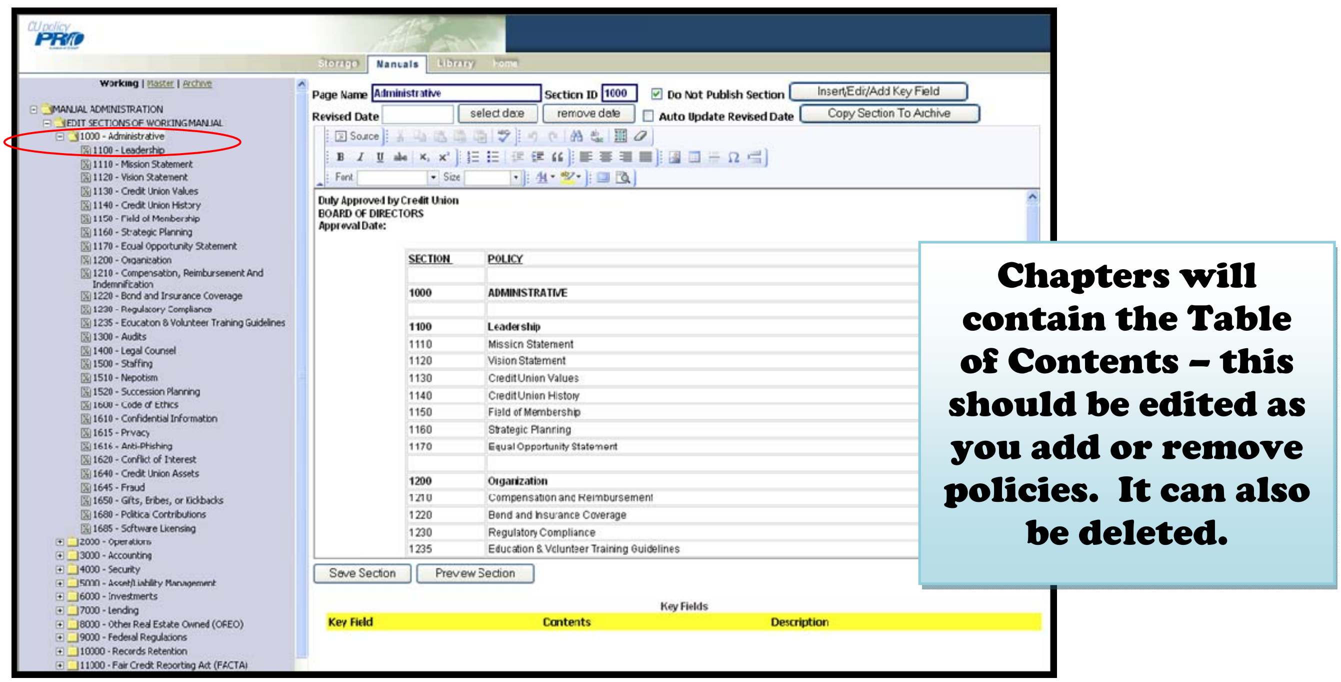
Manual Builder – The Working Manual

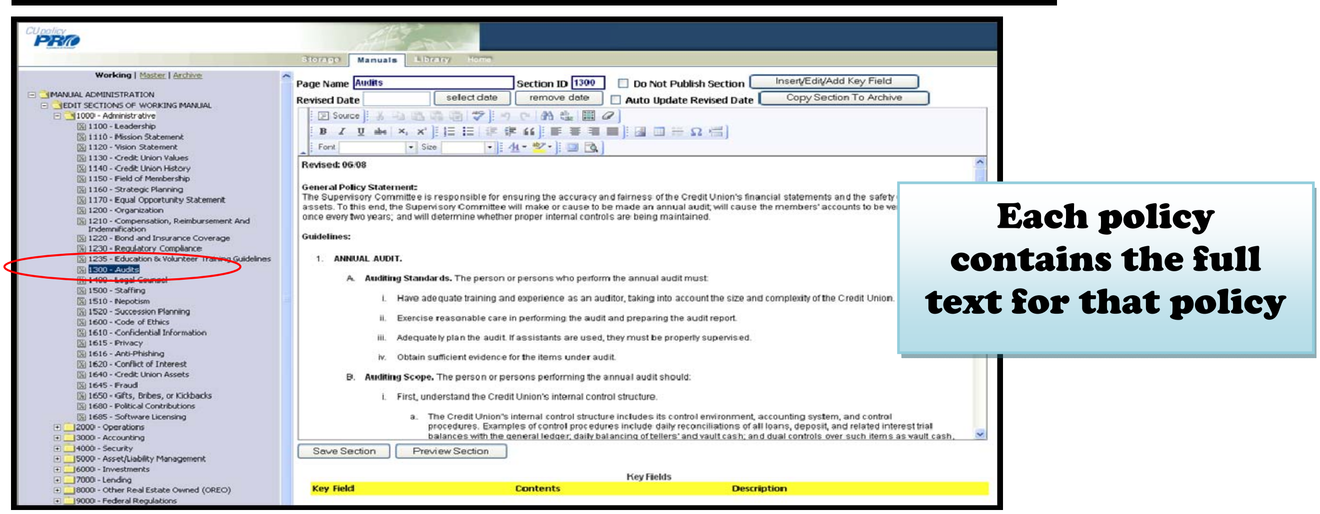
The *Working Manual* is divided into Chapters, represented by folders. Expand each Chapter folder to view the policies found within that Chapter.

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, the Table of Contents 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.



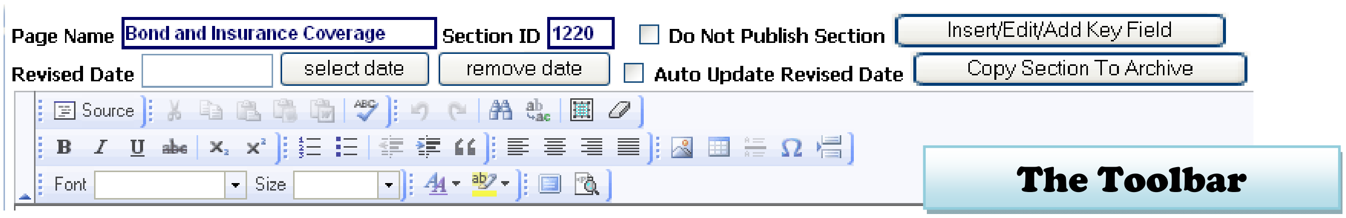


Manual Builder – Editing the Working Manual

The Toolbar

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.

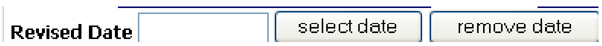
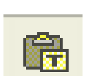
When adding or editing content, you will be in an editing environment that is very similar to MS Word. The Toolbar has many of the same tools that are used in Word.

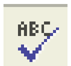
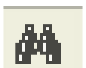
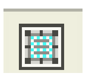


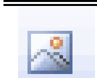
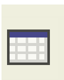
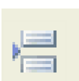
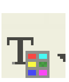
The following section outlines the functions of each item in the Toolbar.

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 pages 28-29 for more information on removing policies.***

Manual Builder – Editing the Working Manual

Icon	Function
	This button allows you to edit any Key Field within the manual. See pages 23-24 for more information on Key Fields.
	Use the "**Select Date**" button to add a date to the "**Revised Date**" field. The Revised Date will appear below the title of the policy in the published manual. The "**remove date**" button removes the date from the field.
	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.
	"**Copy Section to Archive**" will place a copy of the current version of the policy into the Archive. A pop up box will appear with to confirm the section has been archived. **See page 31 for information on Archiving multiple policies at once.**
	**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 .
	**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.

Icon	Function
	**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.
	**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**.

Icon	Function
	**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.
	**Show Blocks**. Shows individual blocks of text throughout the document.

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.

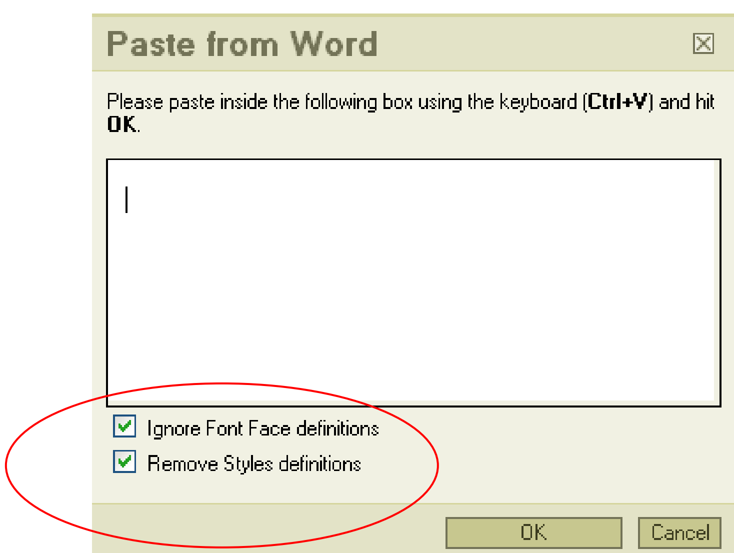
Text can also be copied/pasted from other sources, such as MS Word, or Excel.

Tip: When pasting from Word or other Microsoft documents, it is recommended to use the "Paste from Word" icon in the Toolbar (see below). 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 CU PolicyPro editor. The "Paste from Word" function will strip out the extraneous code, allowing you to format the text easily.

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.

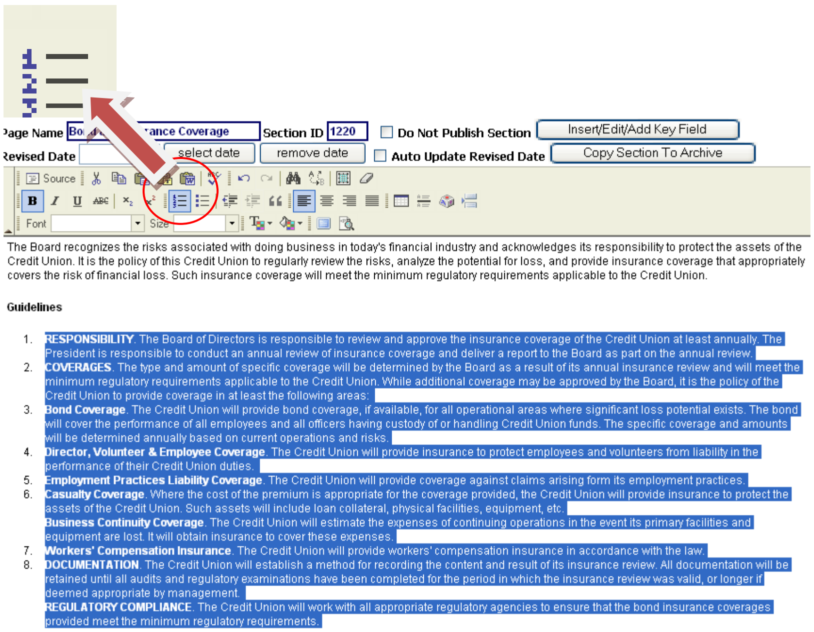


Manual Builder – Editing the Working Manual

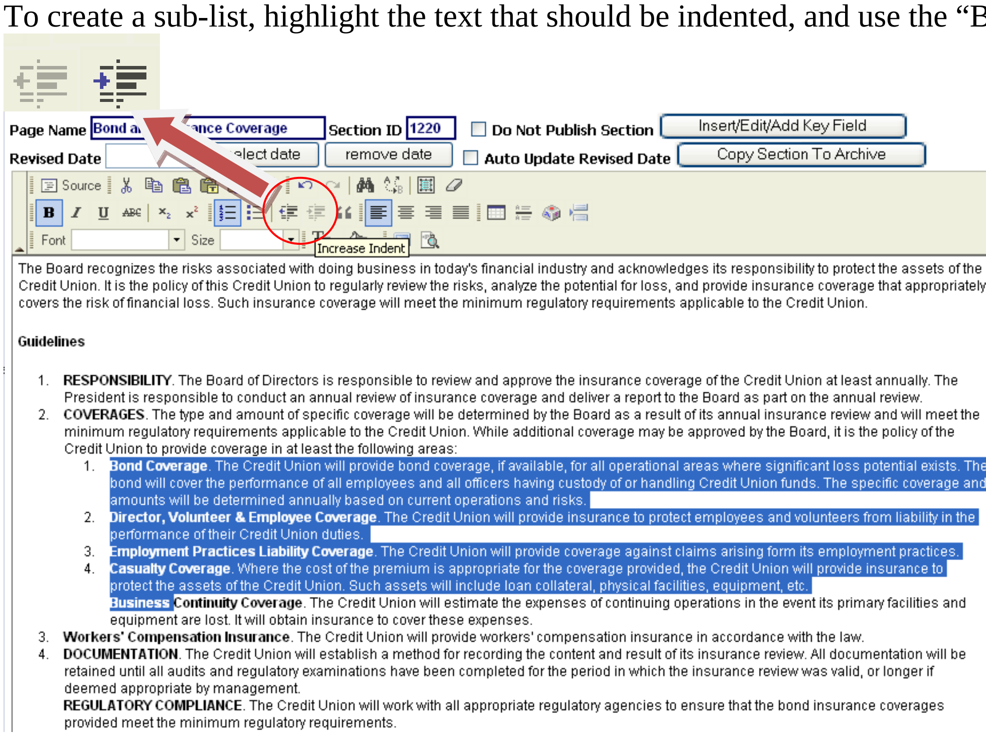
Formatting Numbered Lists

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.

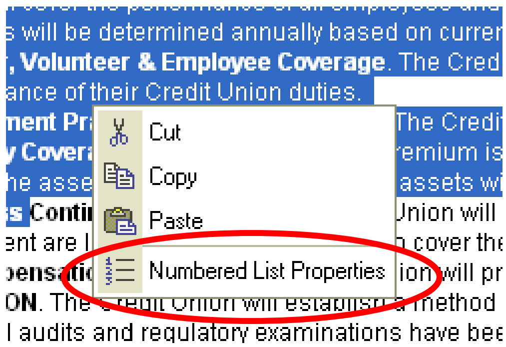


To create a sub-list, highlight the text that should be indented, and use the "Block Indentation" icon.



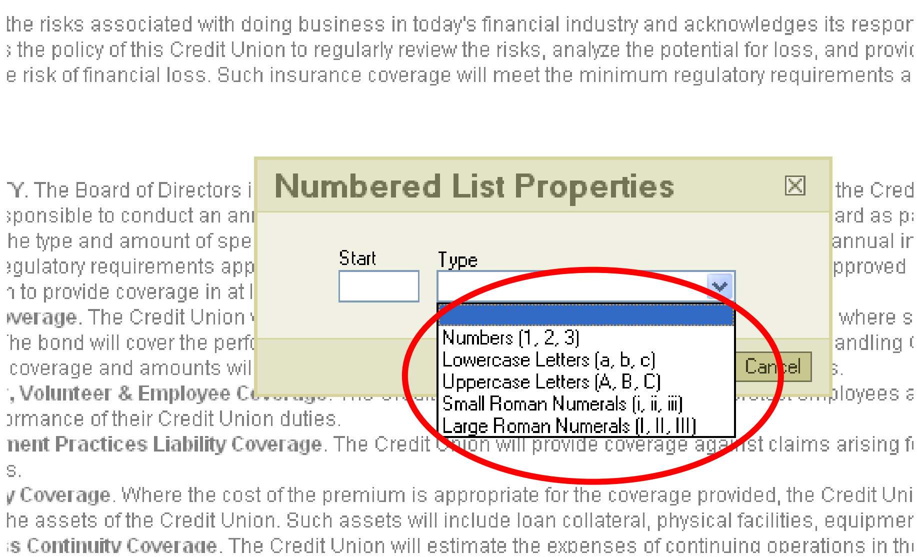
Formatting Numbered Lists (continued)

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.

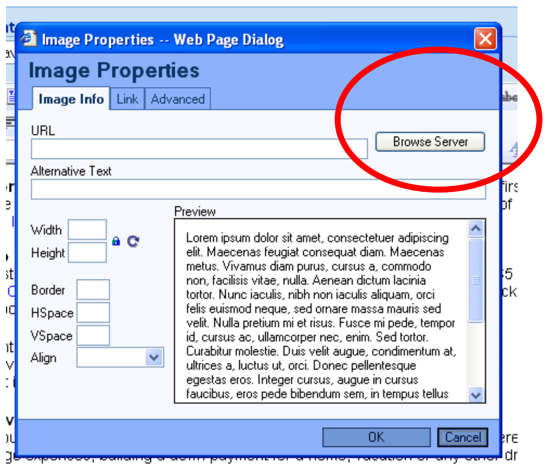


Tip: By default, the system will keep each item in a numbered list together with no spacing between each item. To create a line break of space, place your cursor at the end of the first item, and hold the SHIFT key as you press enter (SHIFT+ENTER). Then press the space bar to add a "space" in the newly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

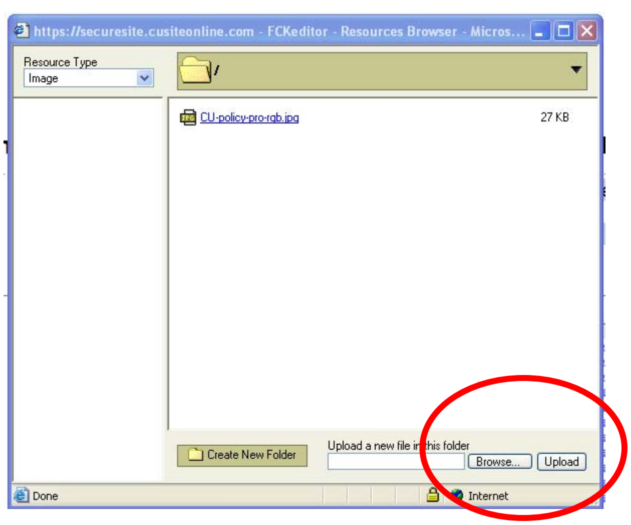
Inserting and Editing Graphics

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.



Inserting and Editing Graphics (continued)

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.

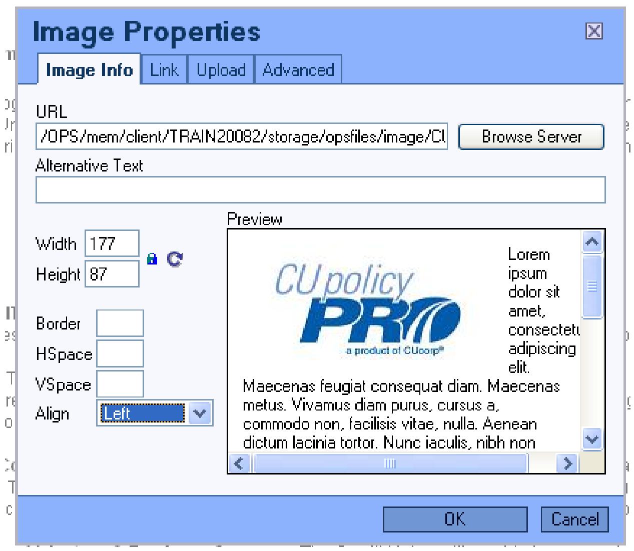


Image Properties
You can change image properties prior to inserting the image or after an image has been inserted. To change properties after the image in inserted, right click on the image and choose "Image Properties".

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.

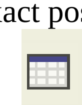
Note: Your uploaded images will be stored (and are visible) in the Storage Area (file Opsfiles > Image). Do Not Delete these files from the Storage area or they will not be available for your manual! Images uploaded to this folder through the Storage area are also available when adding images to a page.

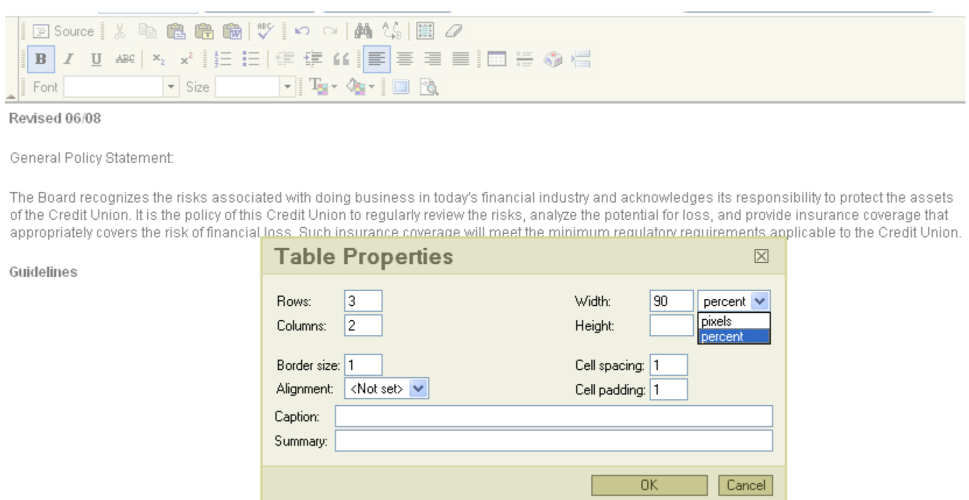
Manual Builder – Editing the Working Manual

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.

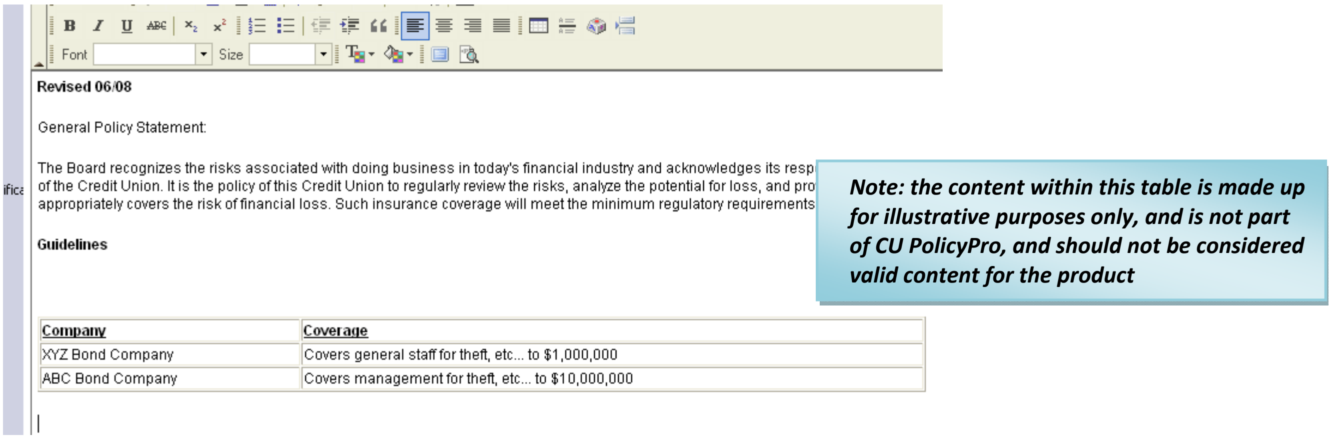
Alignment: Aligns the table the left, right or center of the page. If nothing is selected, default is "left"

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%!

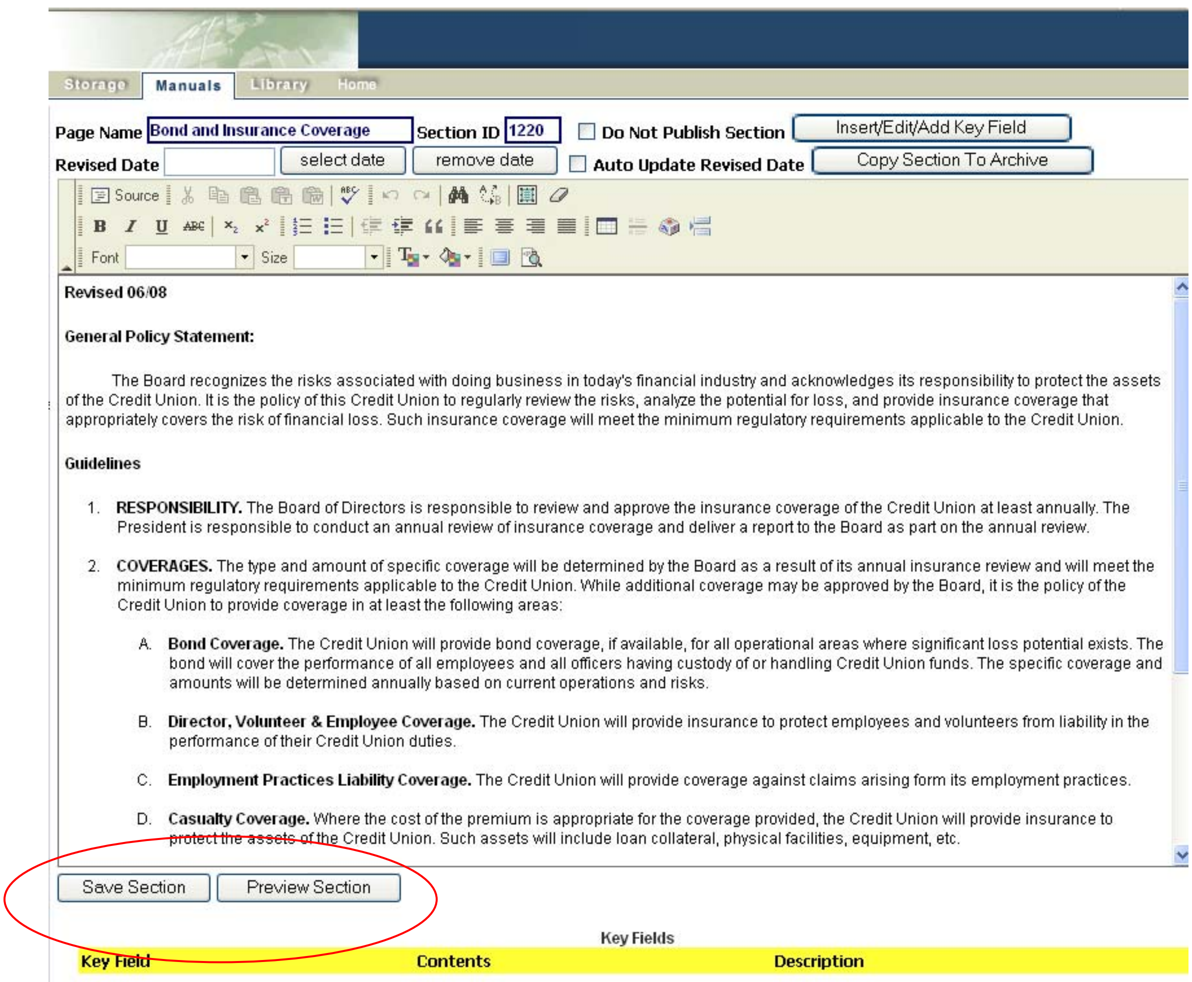
Manual Builder – Editing the Working Manual

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.



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 do need to save the 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 – 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 amount of cash each teller may have in their drawer.

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>.

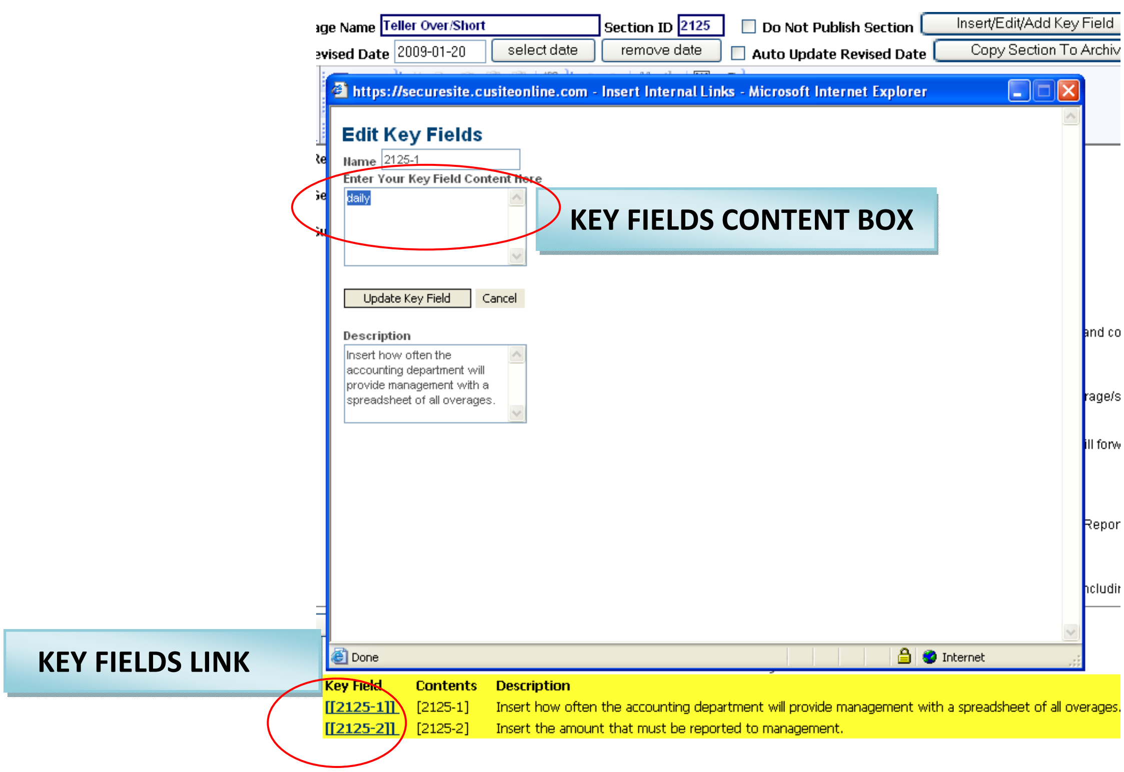
The Key Fields are numbered and enclosed in brackets (e.g., [[2400–1]]). The first number of the Key Field correlates to specific policy numbers, making them easy to find throughout the Manual.

For each policy that contains a Key Field, all Key Fields are listed directly below the content area in a yellow 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, and close the dialog box.

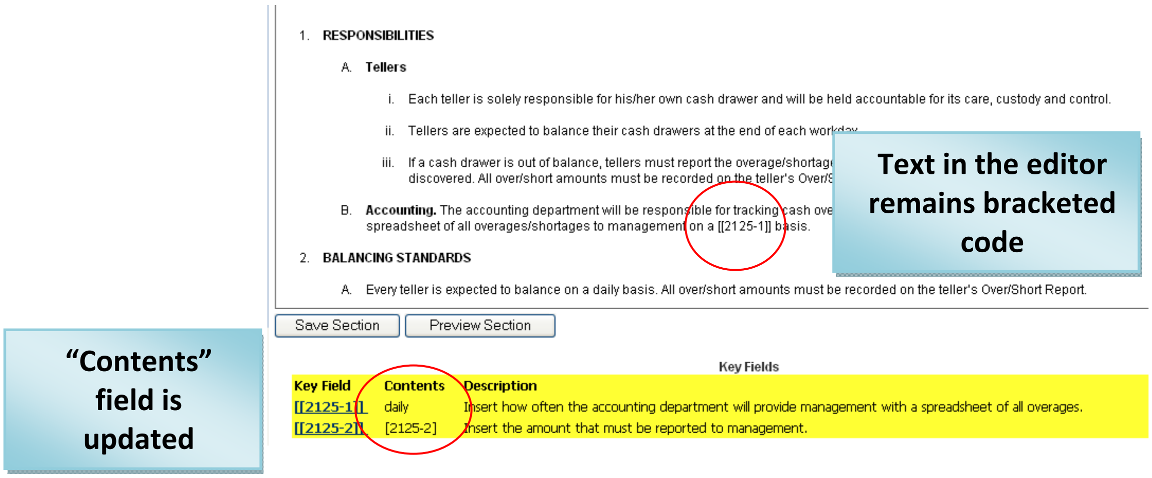


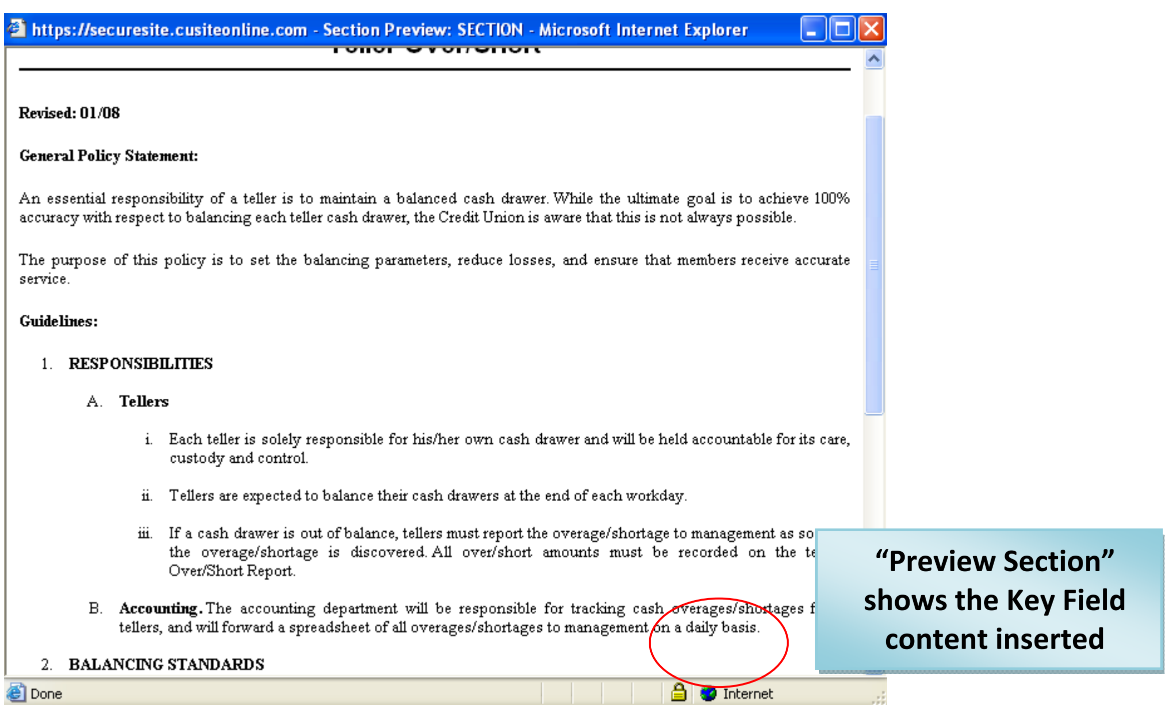
Manual Builder – Editing the Working Manual

<u>Key Fields (Continued)</u>

Once you have updated the Content of the Key Fields, <u>you will need to save the policy</u> 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.





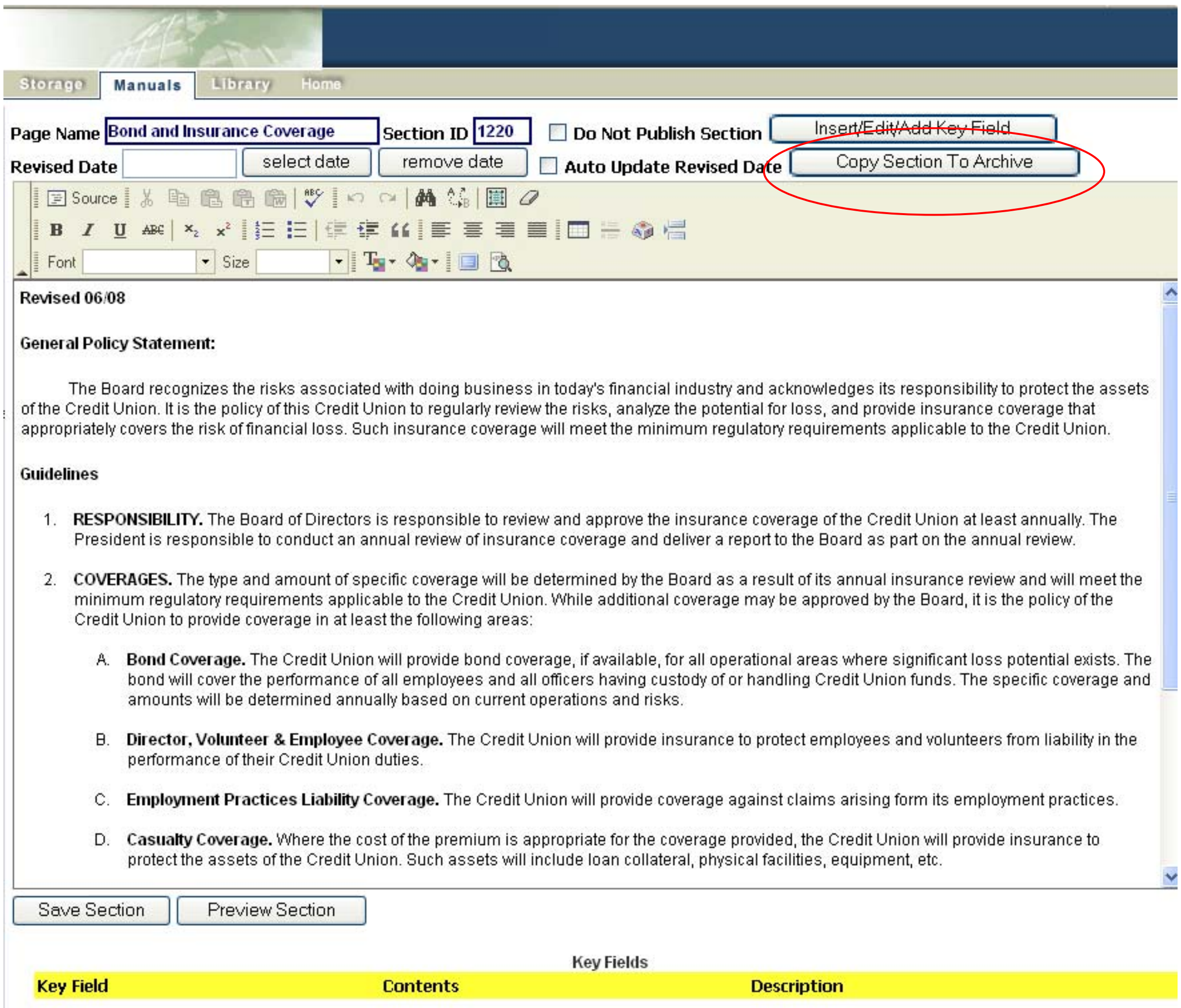
Note: See pages 34-35 for more information on the Key Fields Database and Reviewing a report of all your defined key fields

Manual Builder – Editing the Working Manual

<u>Archiving Policies</u>

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 “Copy Section to Archive” button in the Toolbar.



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.

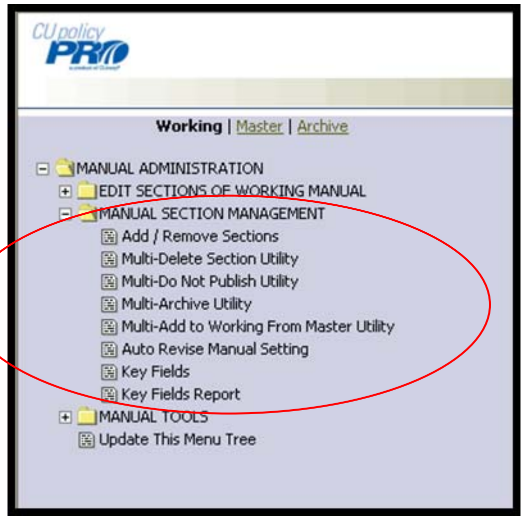
Tip: Use the archive to save copies of policies that you have customized for the credit union. Policies with Master content only, that have not been customized at all, can always be restored from the *Master*. This will help keep your *Archive* area easier to maintain.

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 or Remove** Sections, **delete multiple sections** at once from the *Working Manual*, Set multiple sections of the *Working Manual* to "**Do Not Publish**", **Archive Multiple Sections**", **move multiple sections** from the *Master Manual* to the *Working Manual*, check the "**auto revise date**" across all sections of the *Working Manual*, work with **Key Fields**, and view the **Key Fields Report**.

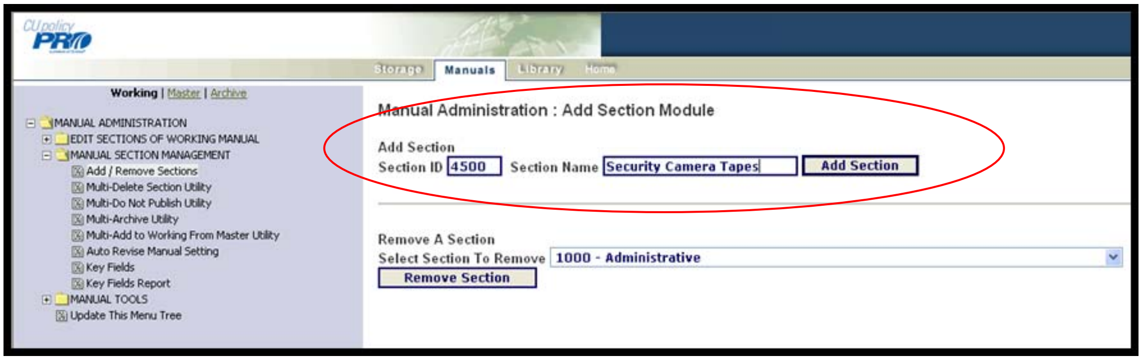


Manual Builder – Manual Section Management

<u>Adding a Section</u>

Click the "Add/Remove Sections" link in the *Manual Section Management* folder.

This brings up a form which allows you to add a section, and a dropdown list which allows you to remove a section to your Working Manual.



To **<u>add</u>** a section, type in the section number and the section name, and click the "Add Section" button. The new section will appear in the Working Manual in numeric order.

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*. For policy numbers above 11999, you will first need to create a corresponding Chapter Folder (12000, 13000, etc) or the policy will not be accessible for editing in the *Working Manual*.

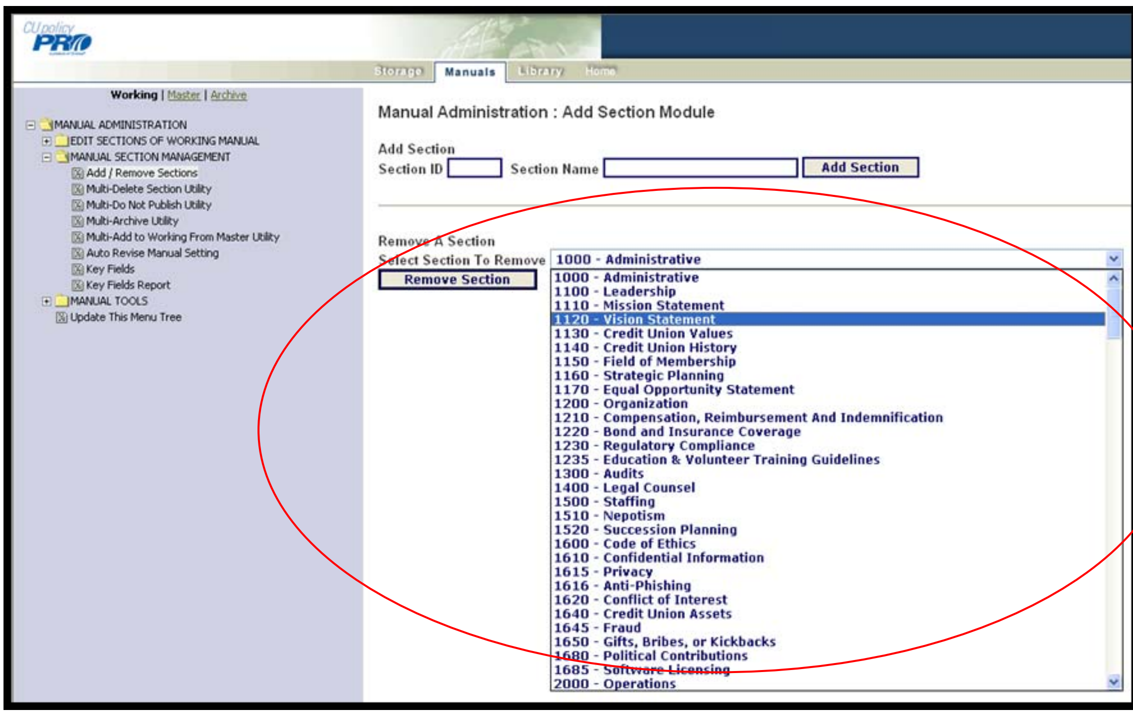
Manual Builder – Manual Section Management

<u>Removing a Section</u>

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

This brings up a form which allows you to add a section, and a dropdown list which allows you to remove a section to your *Working Manual*.

To **<u>remove</u>** a section, find the section you want to remove in the dropdown list under “Remove A Section”, then click the “Remove Section” button.



Sections that are removed are permanently deleted! If you wish to keep a copy of a particular section, Copy the section to Archive (see pages 25 or 31) BEFORE you delete it.

Tip: Sometimes people will click on the “Remove Section” button without first selecting the section they would like to delete. This will then delete the first section listed on the dropdown box, which is usually the 1000 Administration folder. If a Chapter folder is deleted, any policies within that chapter will no longer be accessible for editing in the *Working Manual*.

To restore a missing chapter folder, you can either create a new chapter folder using the “Add Section” area (this will create a blank page for this Chapter page), or you can go to the Master Manual and restore it from the Master (see page 40 or 32). Restoring from the Master will restore Table of Contents on the Chapter page. Once the folder is restored using either method, the policies that were within that chapter will again be accessible for editing.

Note: See page 29 for information on removing multiple sections at one time

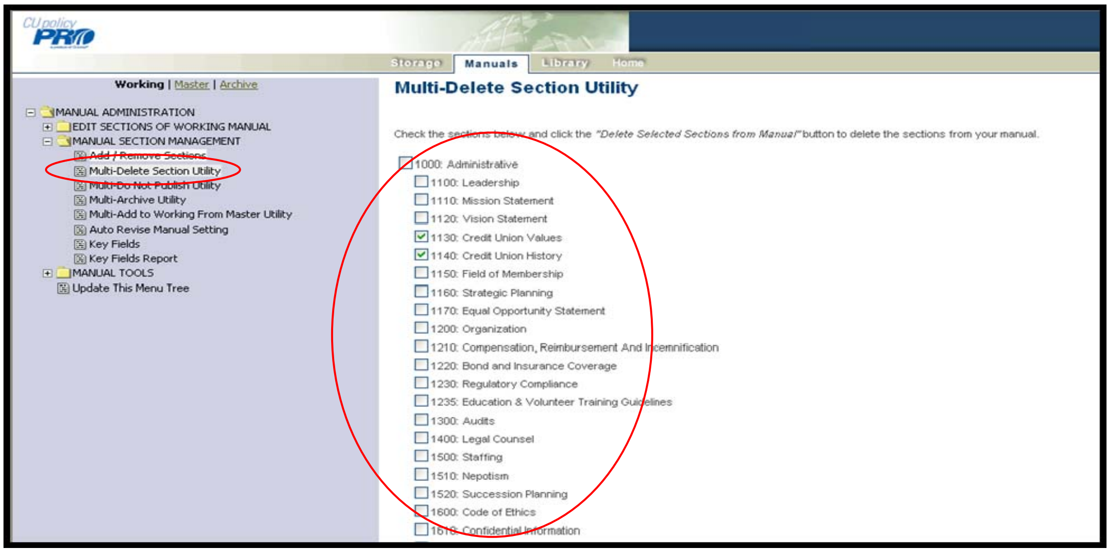
Manual Builder – Manual Section Management

Removing Multiple Sections at one Time

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

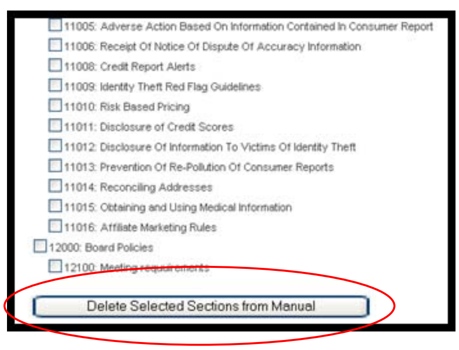
This brings up a form listing all the sections in your *Working Manual*, with a checkbox next to each section.

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 25 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 page, not all the policies within the chapter. However, 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.

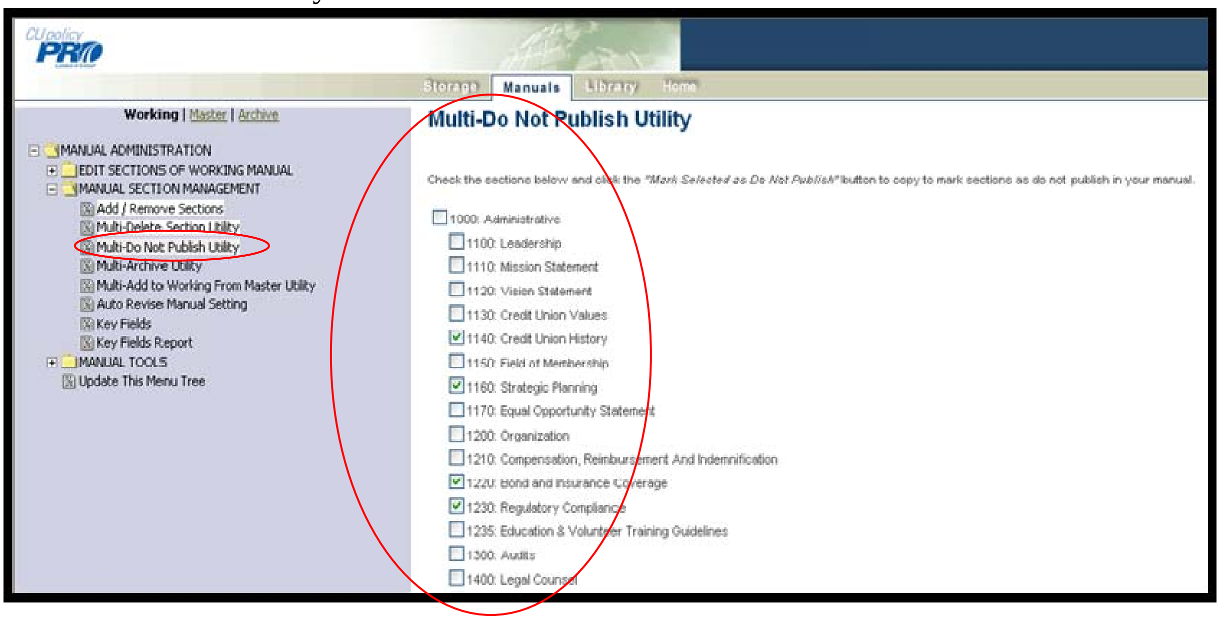
Manual Builder – Manual Section Management

<u>Setting Multiple Sections to "Do Not Publish"</u>

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.

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.

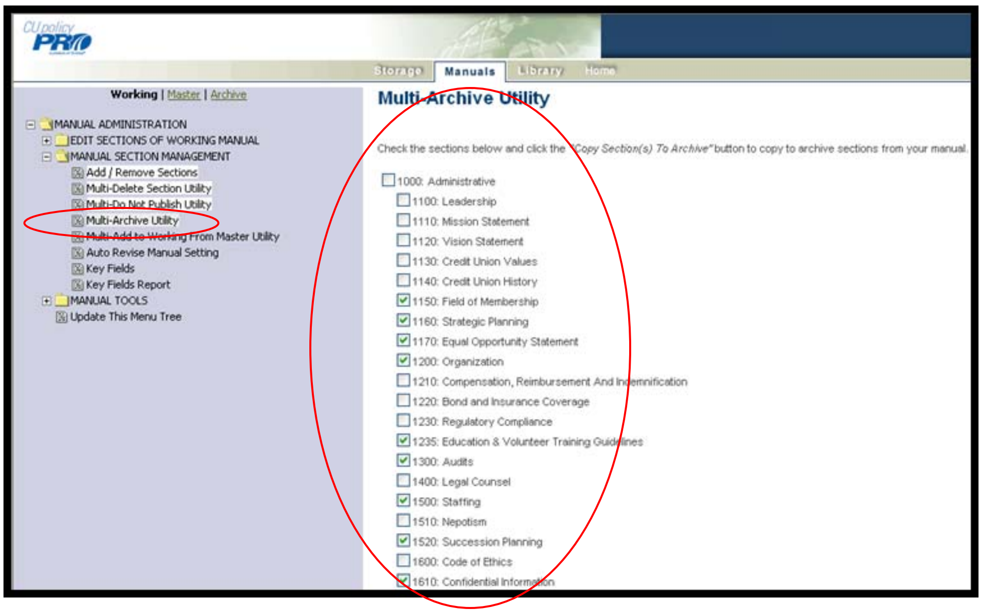
Manual Builder – Manual Section Management

Archiving Multiple Sections at one time

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

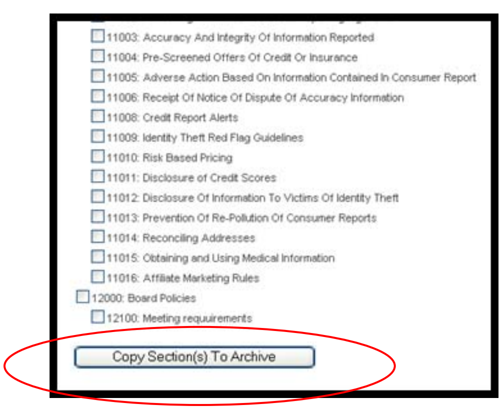
This brings up a form listing all the sections in your *Working Manual*, with a checkbox next to each section.

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 41 for information on viewing and restoring policies placed in Archive.

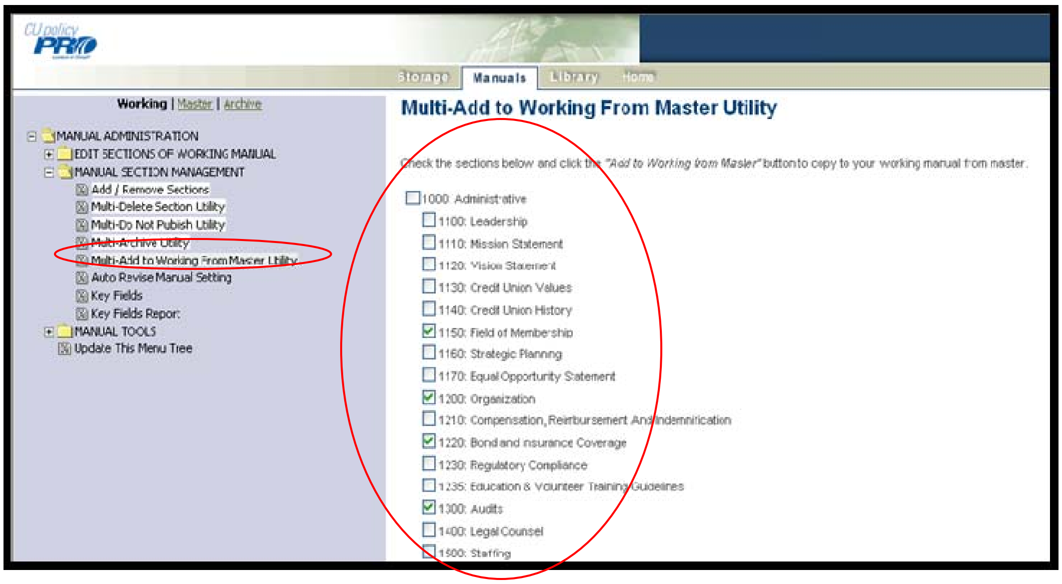
Manual Builder – Manual Section Management

<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.

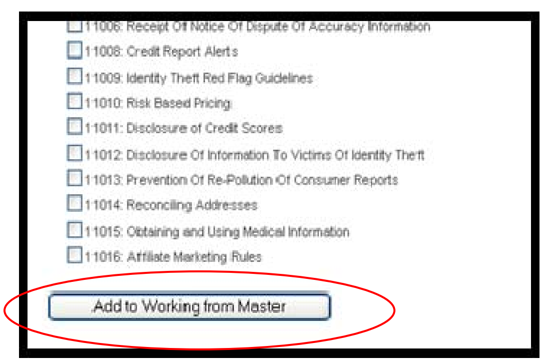
This brings up a form listing all the sections in the *Master Manual*, with a checkbox next to each section.

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 pages 28 to remove a single policy or page 29 to remove multiple policies at once), 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

<u>Auto Revise Manual Setting</u>

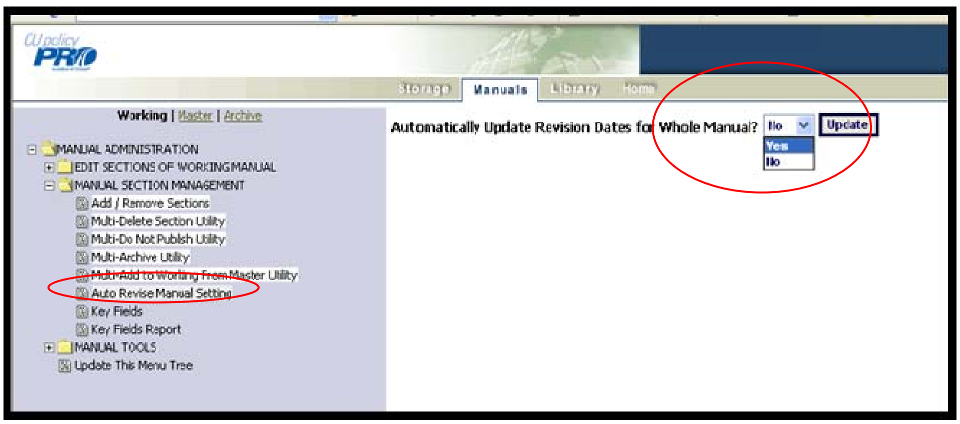
The “Auto Revise Manual Settings” tool allows you to automatically check or uncheck the “**Auto Update Revised Date**” button across all sections of the working manual.

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”.

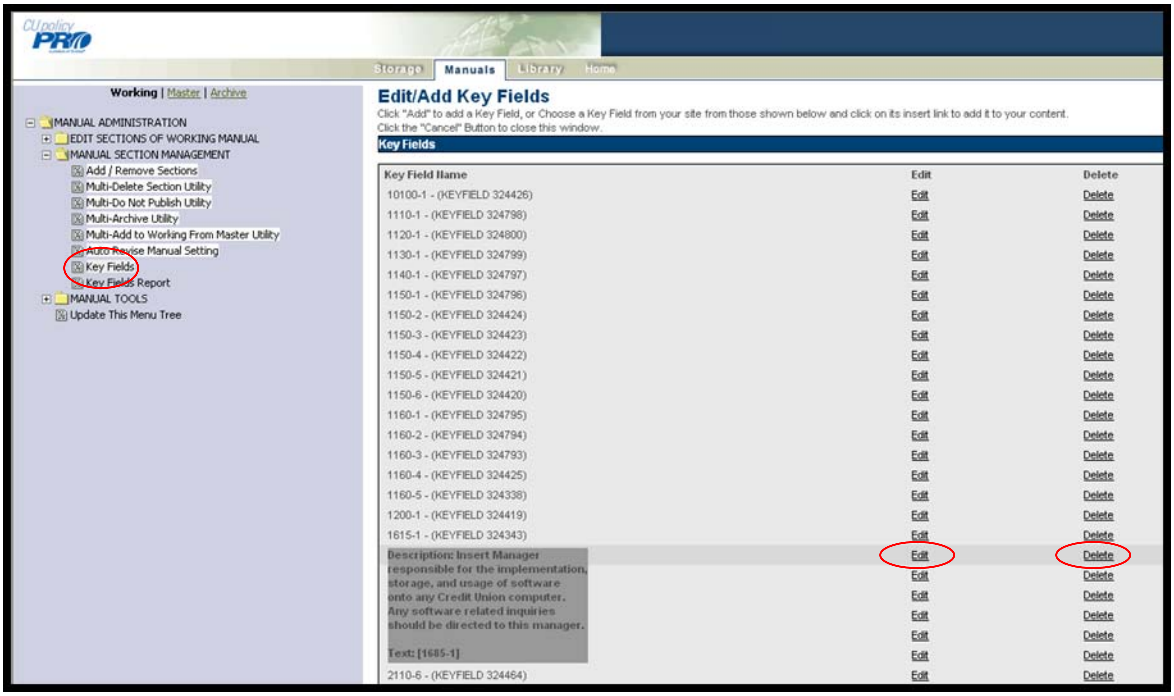
To un-check the box in every policy in your working manual, change the dropdown under “Auto Revise Manual Settings” to “No” and click “Update”.



Manual Builder – Manual Section Management

Key Field Database

The “Key Fields” database is a quick link to access and update all of the Key Fields in the system. 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.



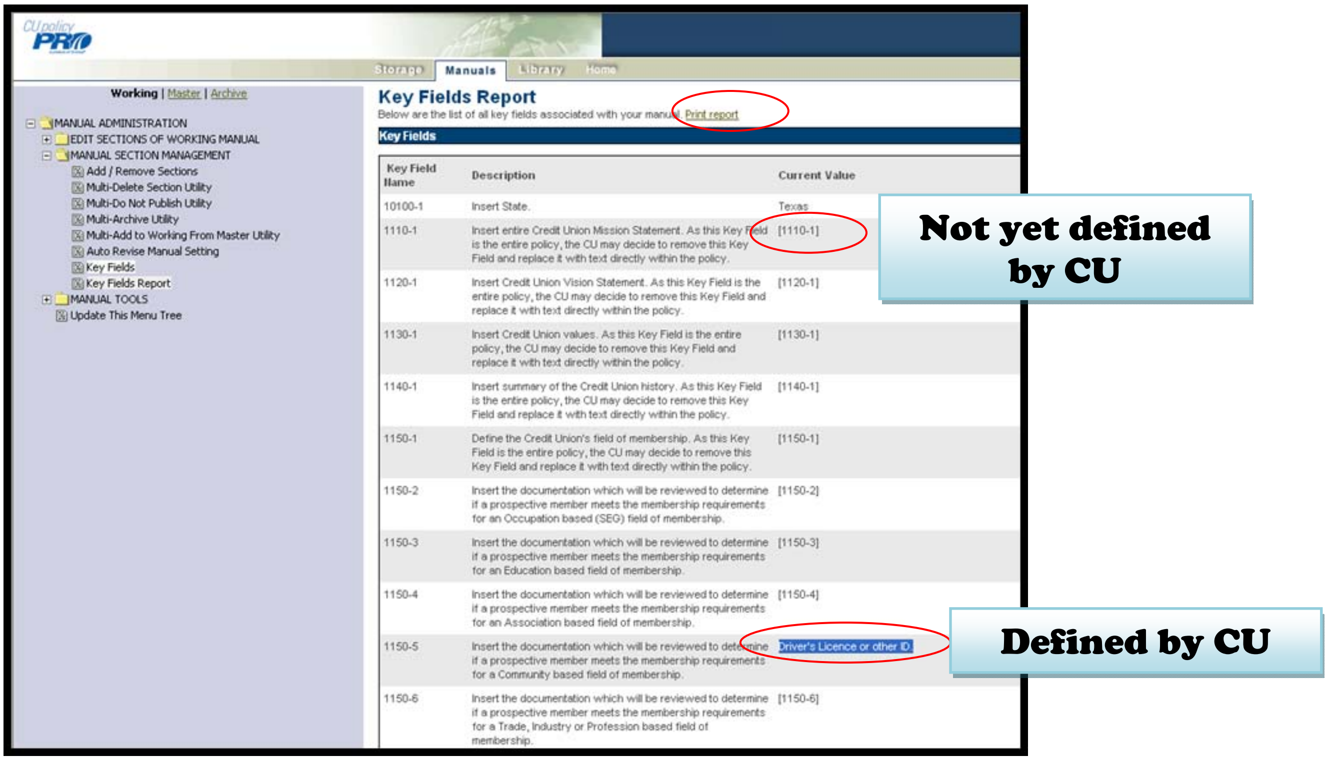
Clicking “Edit” will allow you to edit the content of the Key Field (this is the same tool found within the individual policies of the Working Manual, see pages 23-24). You can also delete a Key Field, although this is not recommended.

Manual Builder – Manual Section Management

Key Field Report

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.



Note: Key Fields can NOT be edited from this screen. This report is read-only.

Note: Any Key Field that is not yet defined by the credit union will show in the “Current Value” column as the Key Field name (i.e. [1110-1])

Manual Builder –Working Manual Tools

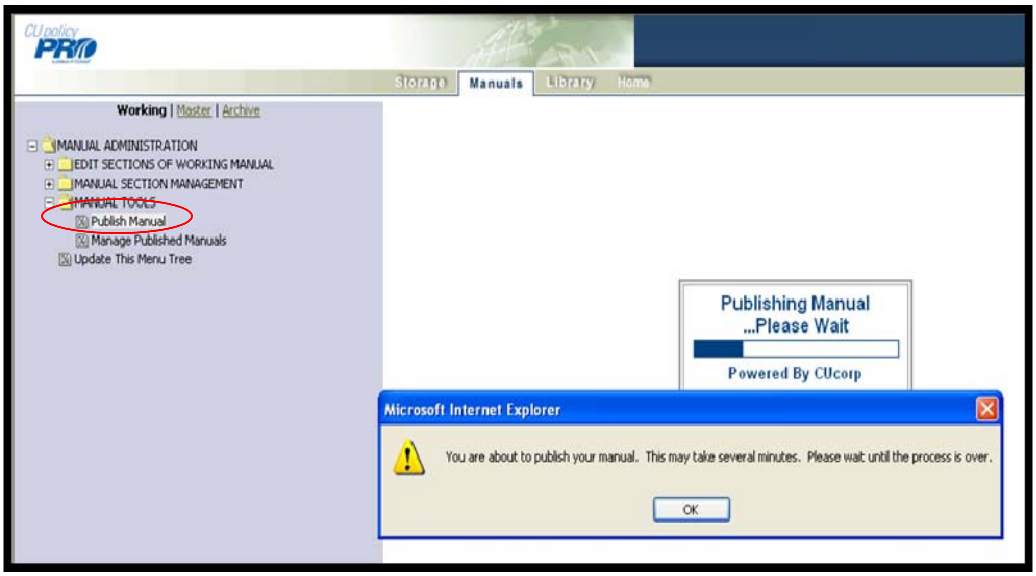
<u>Manual Tools</u>

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

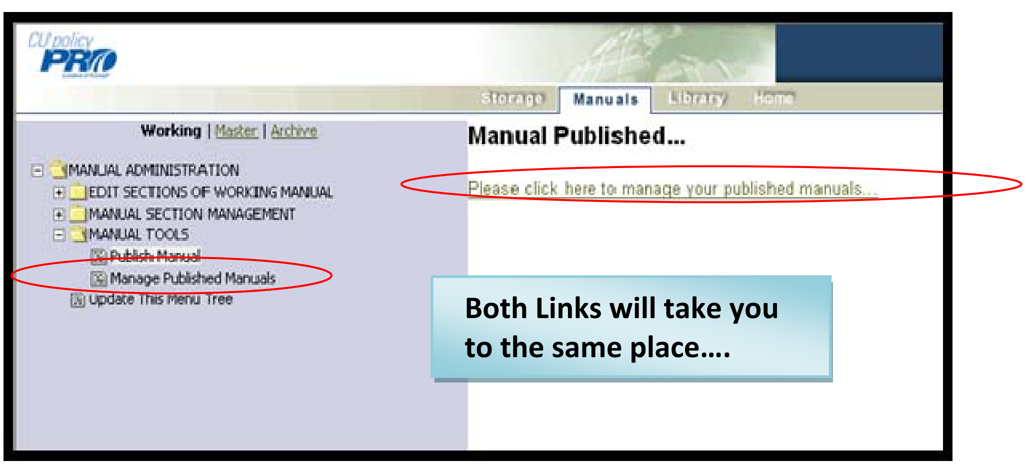
This area allows you to Publish your manual and Manage your previously published manuals.

<u>Publishing the Manual</u>

Clicking the Publish Manual link will begin 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.



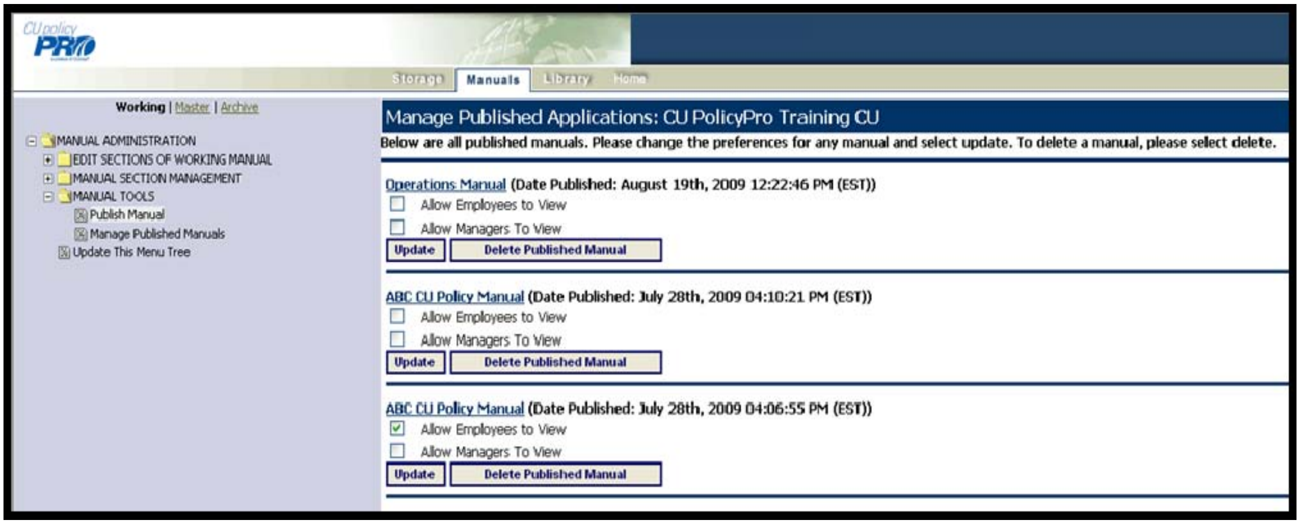
Once the manual is published, you will receive a message that the manual is successfully published, with a link to manage your manuals. The link in the confirmation message will take you to the same spot as the "Manage Published Manual" link with the *Manual Tools* in the navigation menu.



Manual Builder –Working Manual Tools

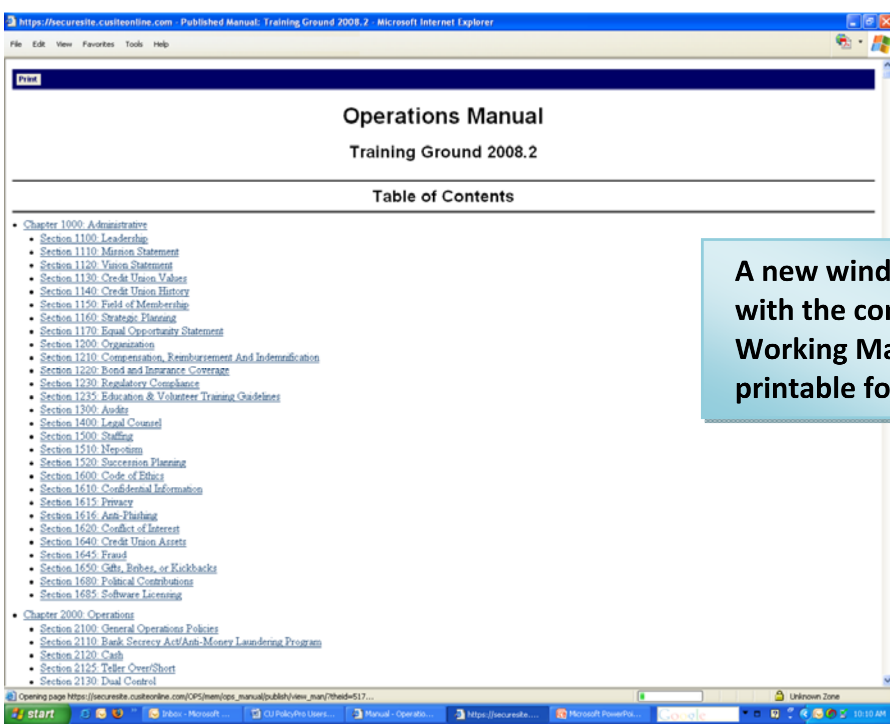
Manage Published Manuals

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, or delete a manual.



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.



A new window opens with the complete Working Manual in printable form

Manual Builder –Working Manual Tools

Viewing and Printing a Published Manual (continued)

The Table of Contents contains clickable links that allow you to go directly to a particular policy within the manual.

Click on the “Print” button to print the entire manual.

Posting Published Manuals on the Home Page

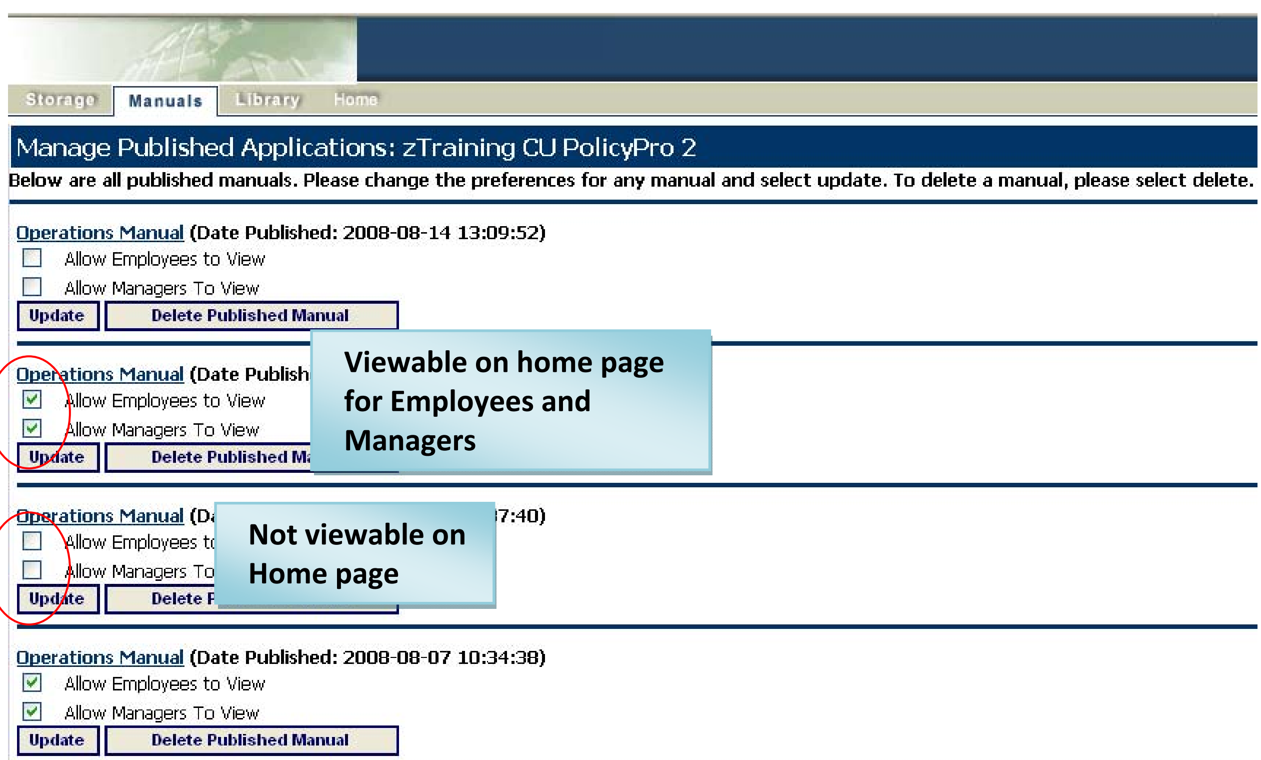
Links to the Published manual can be made available on the Home Page, within the “Manager Manuals” and/or the “Employee Manuals” folders.

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. Click the “Update” button when finished.

Removing Published Manuals on the Home Page

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.



Deleting Published Manuals

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

Printing Tips

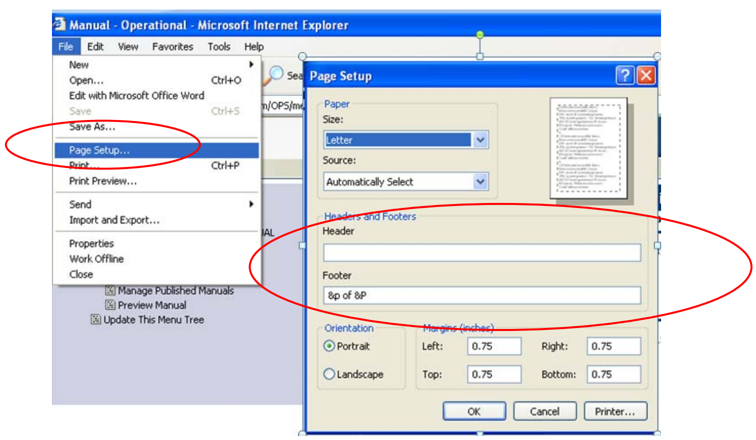
Tip #1: Header and Footer

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**”.

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.



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:

1. Open your published manual.
2. From the File Navigation menu, choose “File”, then “Print Preview” The “Print Preview” will allow you to view all the pages

Manual Builder – The Master Manual

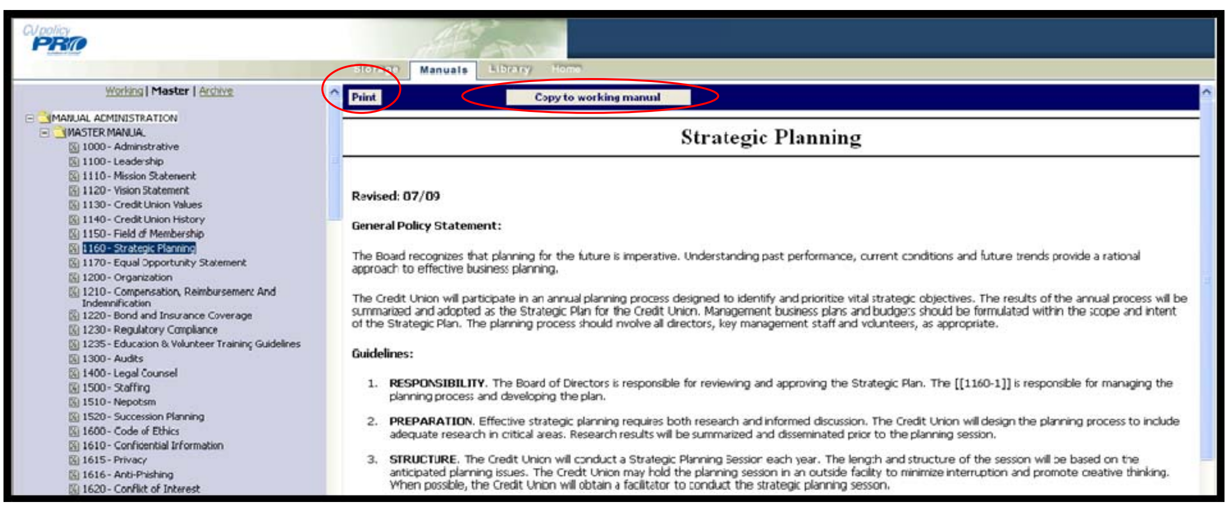
Accessing the Master Manual

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 pages 28 - 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

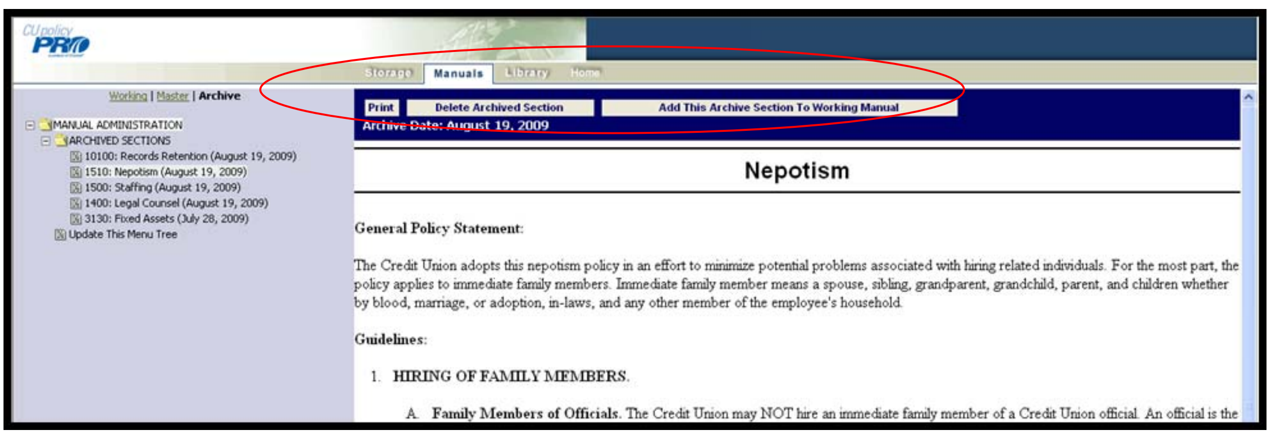
Accessing the Archive

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. (Note: the archive list all policies will appear in order of the date the policy was archived. The items most recently archived are at the top of the list. For more information on how to add a policy to the Archive from the *Working Manual*, see pages 25 and 31.)

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*.



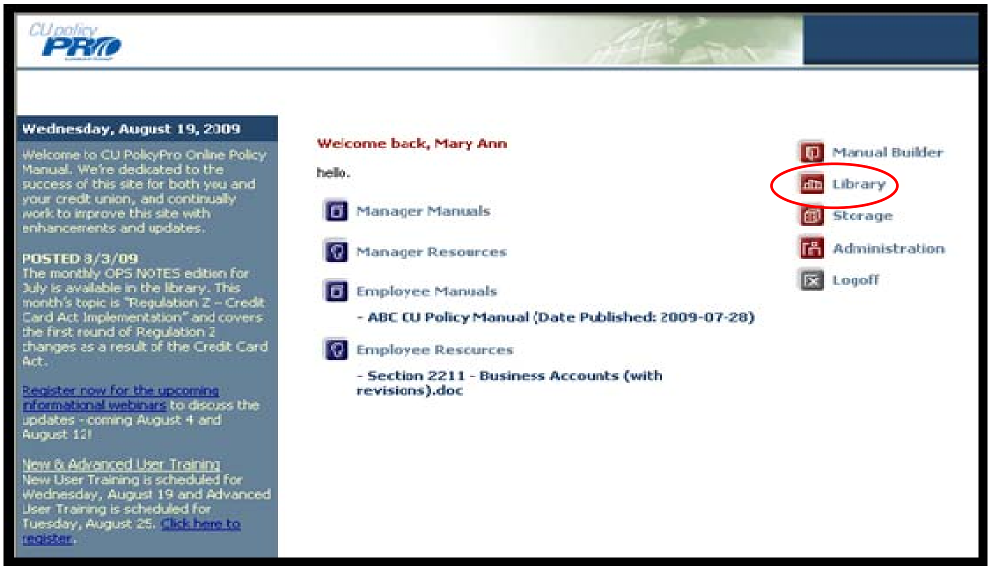
Un-Archiving a Policy

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-archving, be sure to first remove the unwanted policy version from your Working Manual (see pages 28 - 29), then un-archive the proper version of the policy. Un-archving 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.

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 three sections:

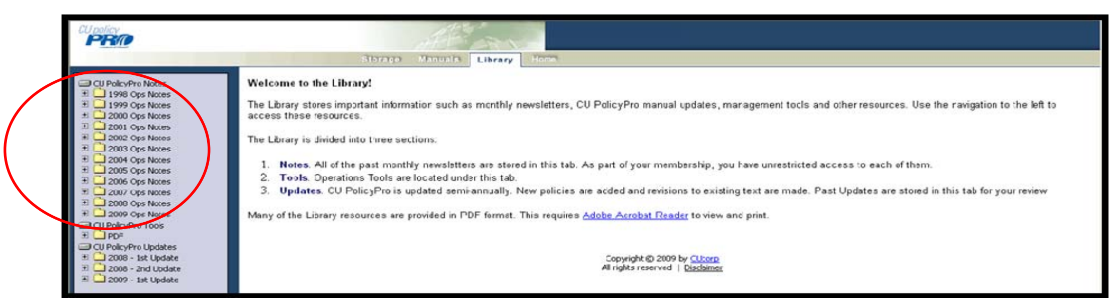
1. **Notes**. All of the past monthly *OPS Notes* newsletters are stored in this tab. As part of your annual fee, you have unrestricted access to each of them.

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.

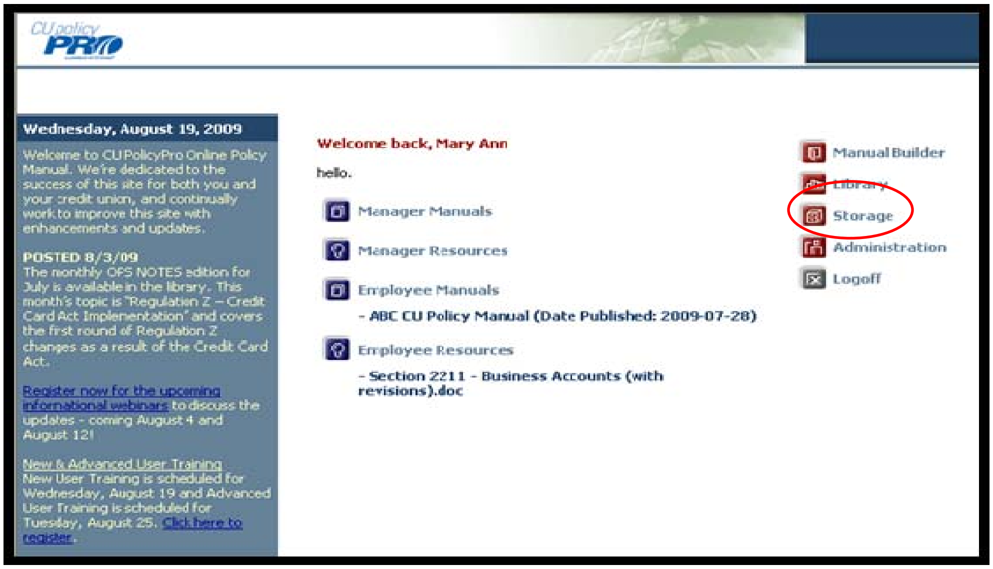
To access any of the items in the *Library*, simply click on the name of the folder (or the plus/minus sign to the left of the folder), and click on the item you want to view. The item will open in a new window.

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.



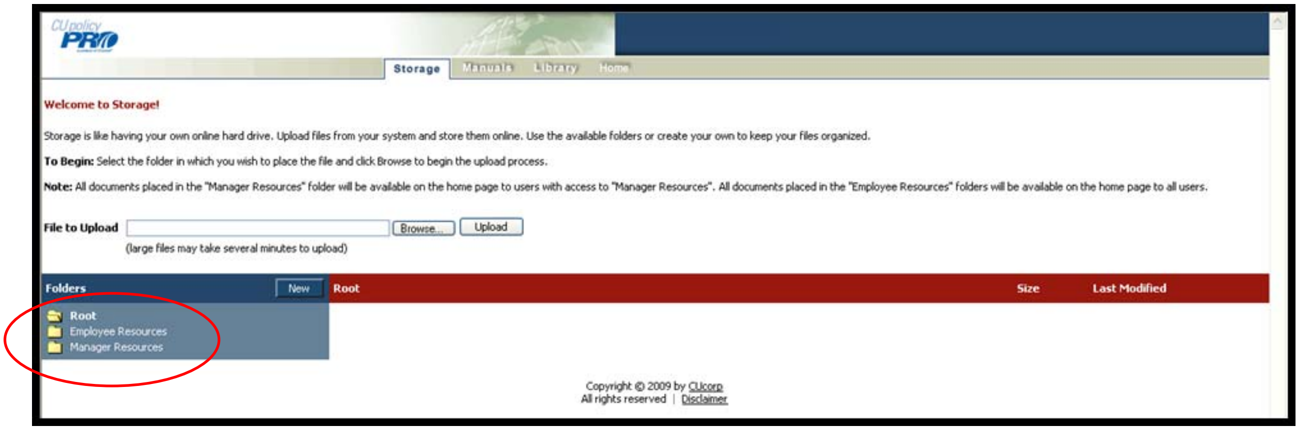
The Storage area allows you to upload and store documents. Once in storage, document can be posted to the Home Page, either in the “Manager Resources” or “Employee Resources” folder.

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.

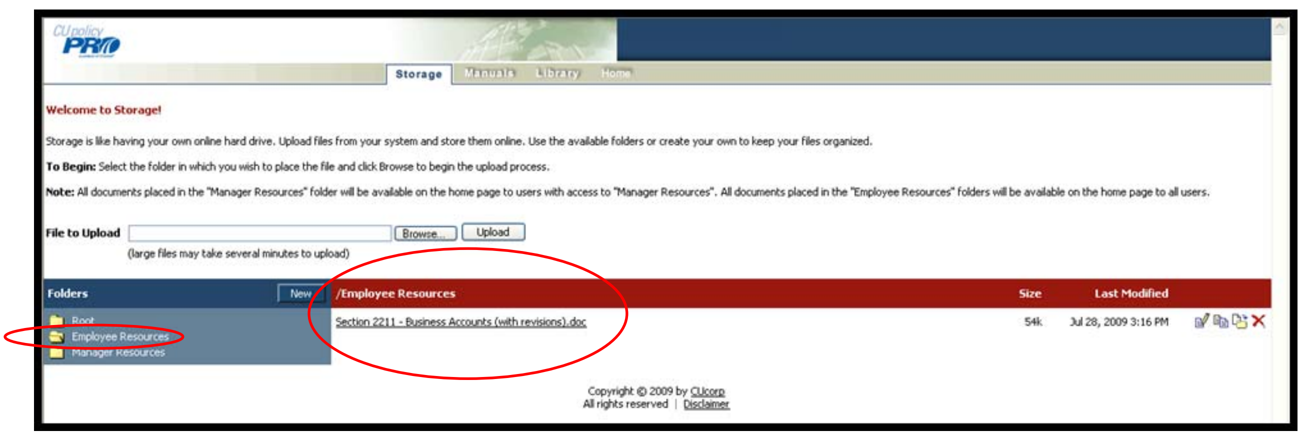
Storage

<u>Storage File Structure</u>

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

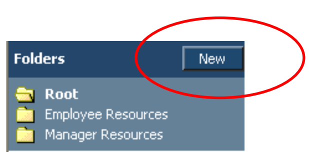


Clicking on the folder name and the contents of that folder will be displayed in the center section of the screen.



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



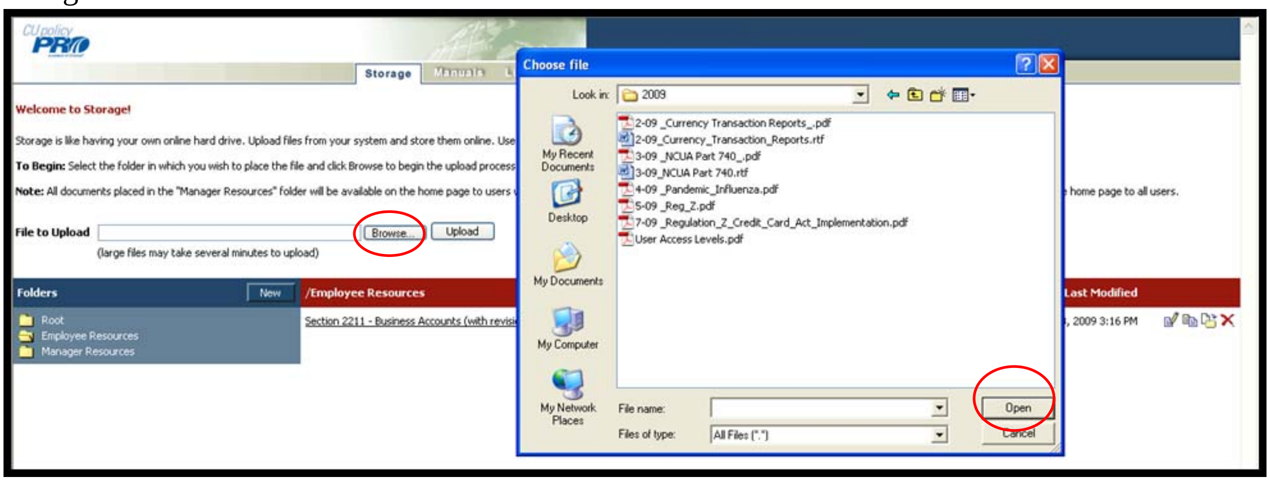
Storage

Uploading Files to Storage

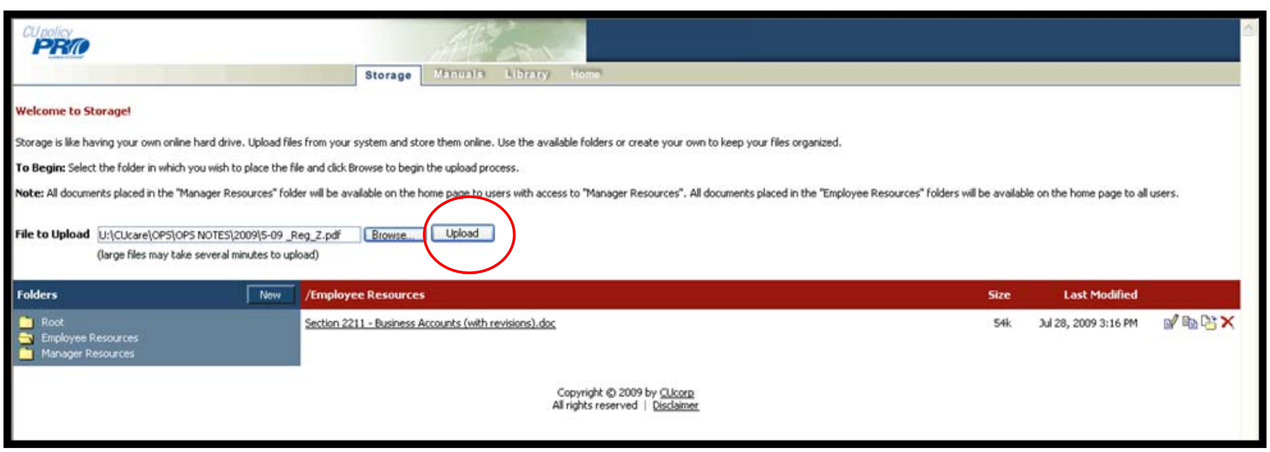
Choose the folder to which you want to upload your document.

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.

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



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

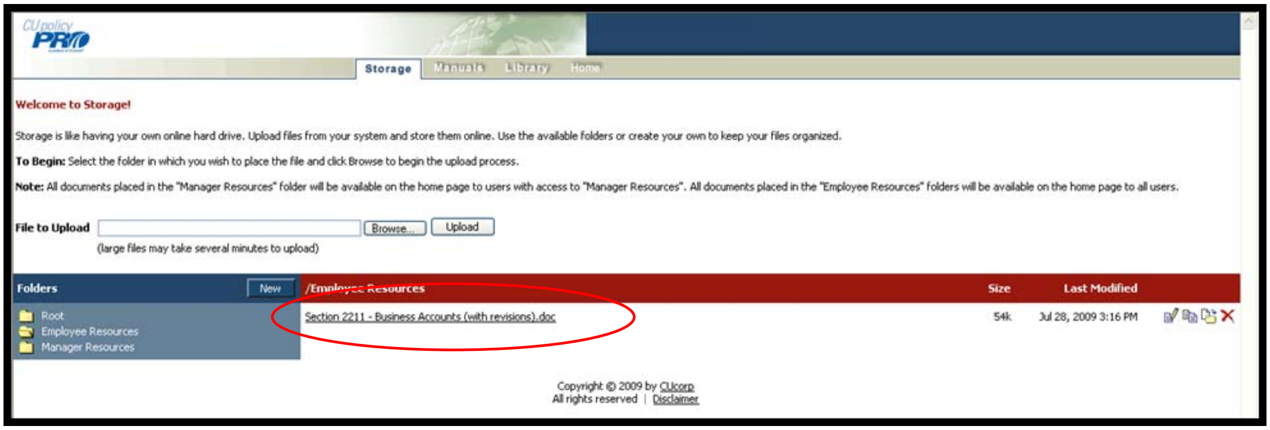


Note: The Storage area supports the upload of multiple file types, such as Microsoft Office, Text, PDF, etc. However, when opening files, the computer you are working on must have that program available in order to access the file. This can sometimes be an issue when opening the file from a remote location.

Storage

<u>Opening files in Storage</u>

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.



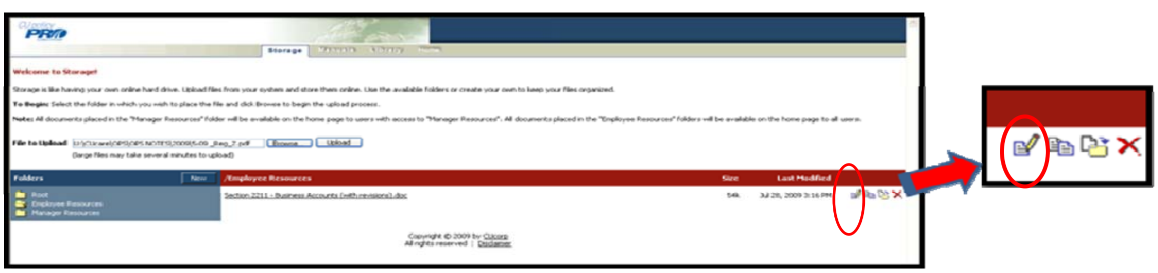
<u>Making Changes to Files in Storage</u>

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*.

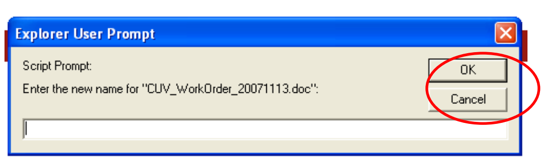
Files within the Storage area can be renamed, copied, moved to a different folder or deleted.

<u>Renaming Files in Storage</u>

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".

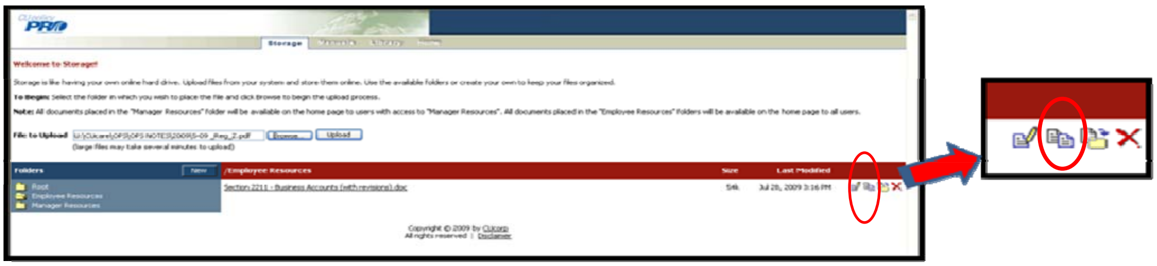


Tip: At the end of the file name, you *must* add the file type extension (i.e. .pdf or .doc, etc).

Storage

Copying files in Storage

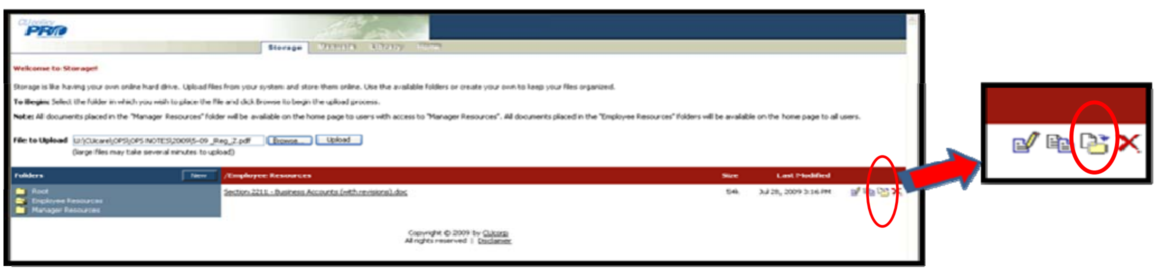
To create a copy of a document within the Storage area, click the “Copy” icon to the far right of the file name.



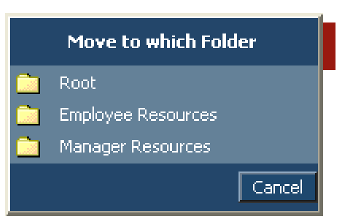
This will create a copy of the file, named “Copy of (file name)”. You can then rename or move this file, if desired.

Moving files between folders in Storage

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

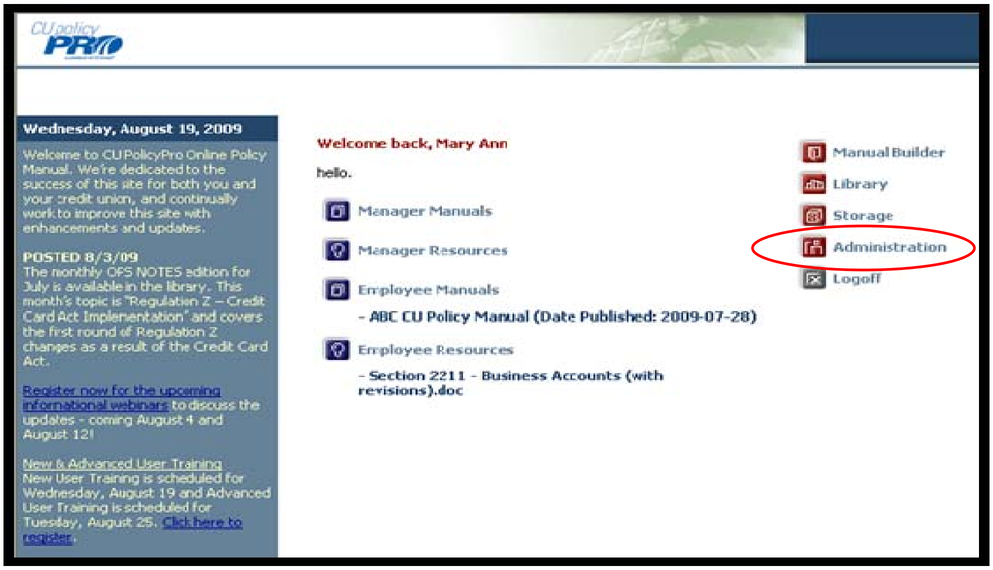
Deleting files in Storage

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.

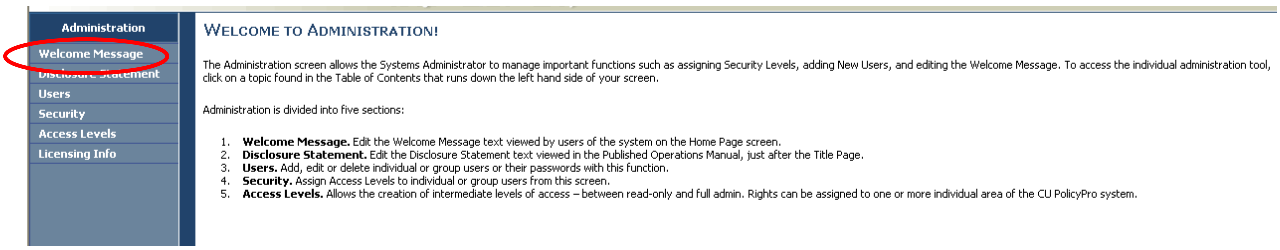


The *Administration* Area allows you to manage several functions, including the managing users, adding a Welcome Message to the *Home* Page, adding a disclosure to your published manual, and viewing your license and subscription information.

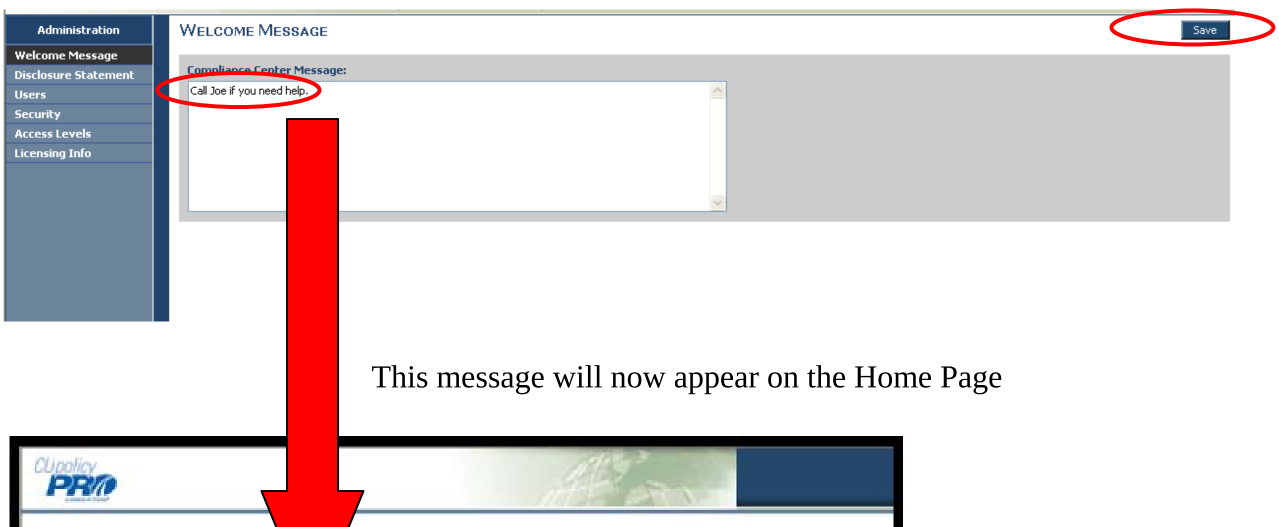
Administration

Adding a Welcome Message to the Home Page

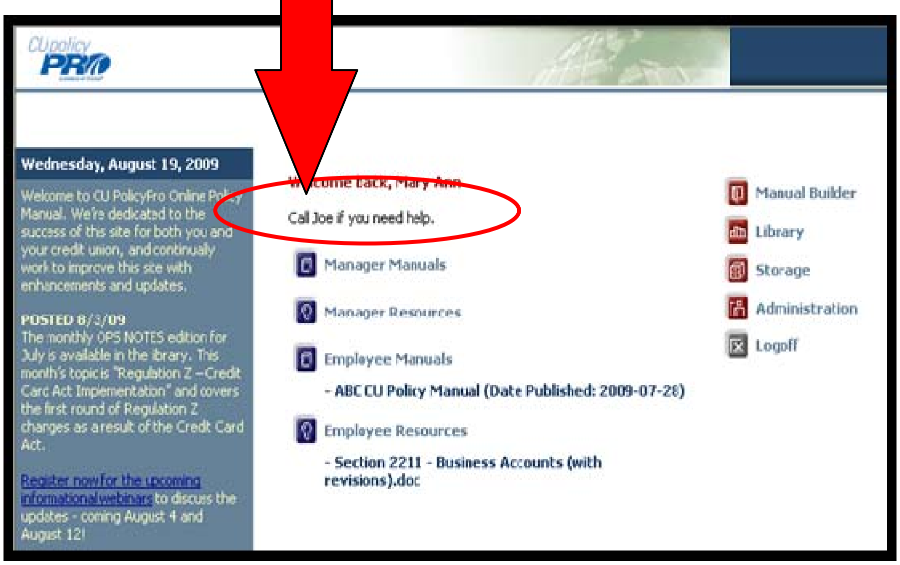
Click on the "Welcome Message" button on the left navigation.



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



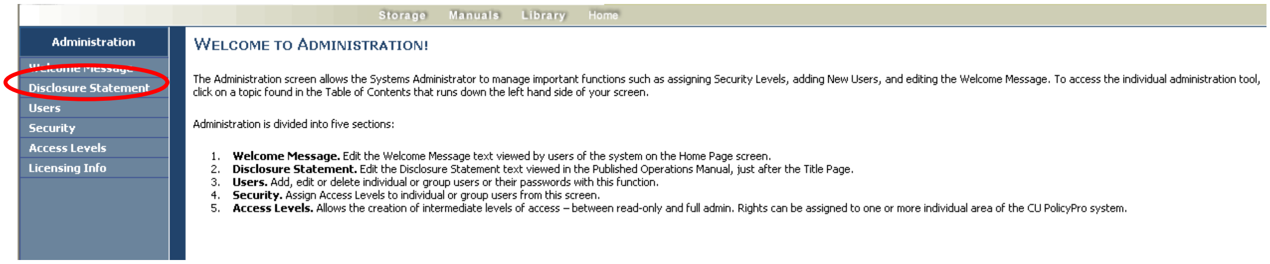
This message will now appear on the Home Page



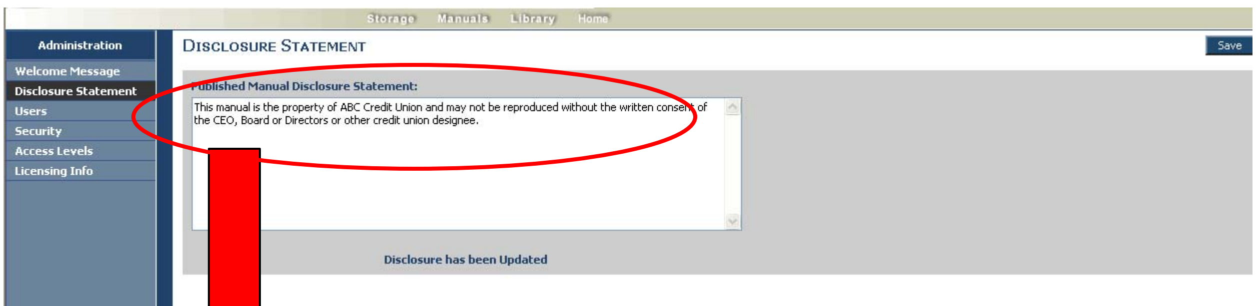
Administration

Adding a Disclosure to the Published Manual

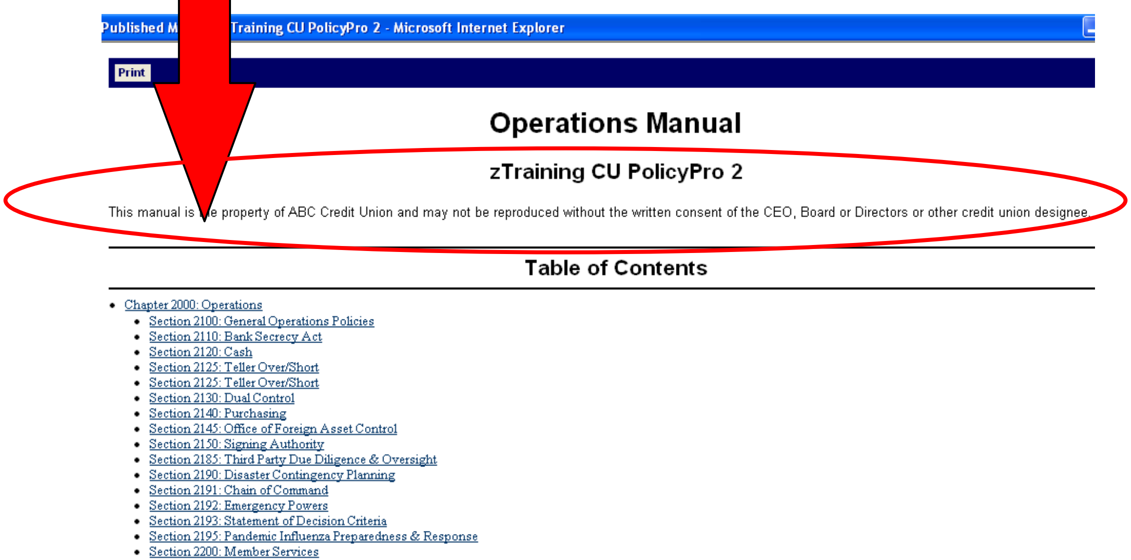
Click on the “Disclosure Statement” button on the left navigation.



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



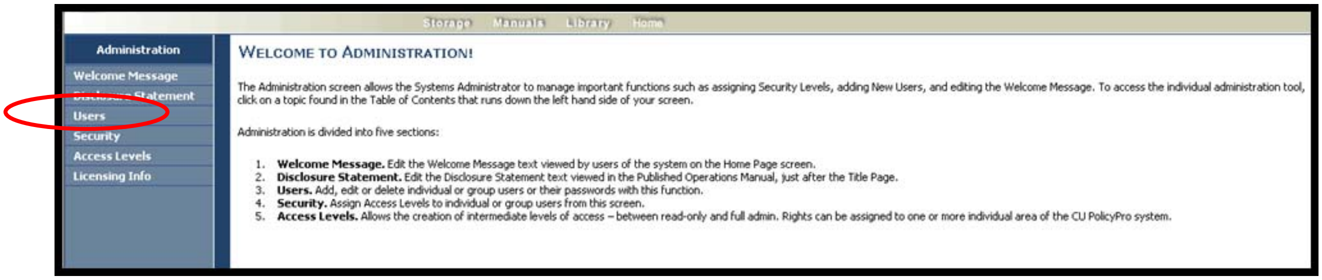
This message will now appear on the in the Published Manual, on the between the Title and the Table of Contents.



Administration

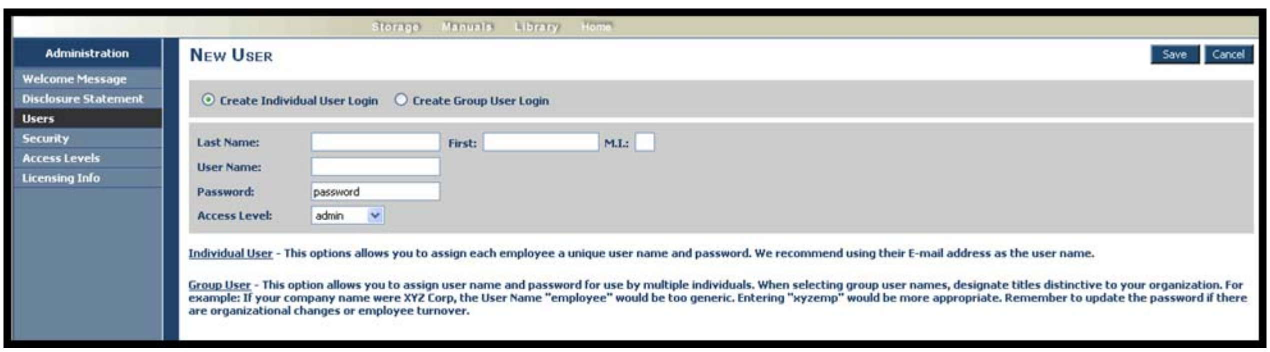
Adding New Users

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.

This will bring up the “New User” form.



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

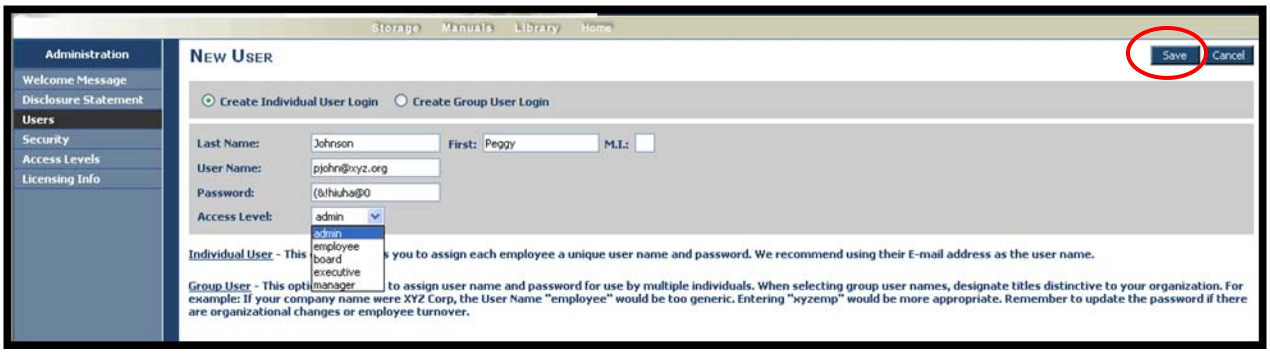
Individual User is a distinct User Name and Password for a specific individual. A Group User is a User Name and Password that is shared among a group who all have the same access level (i.e. Board of Directors or Employees with read-only access)

Administration

Adding New Users (continued)

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.

When you're finished, click the "Save" button.



Tip: An email address must be entered in order for the user to utilize the "Forgotten Password" function from the login screen. If the User Name is an email address, the system will automatically fill in the email address. If not, you must first save the User, then go back into the User Profile to add in an email address under "Optional Information."

There is no option for Group Users to have an email address as the Group is not associated with a single person.

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

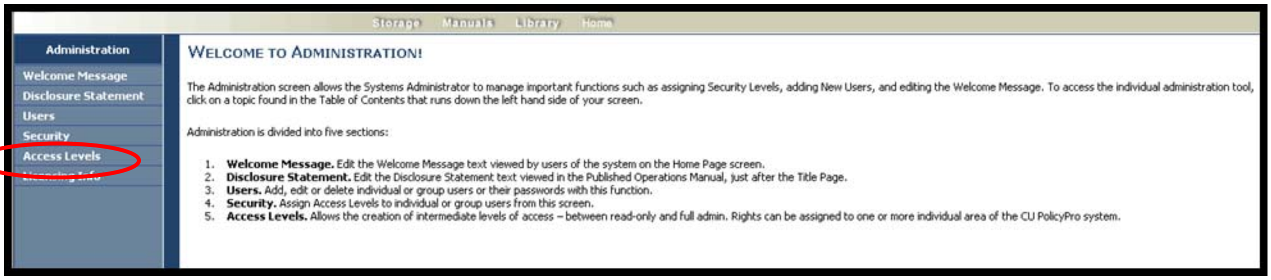
Adding/Editing Additional User Access Levels

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.

Administration

<u>Adding/Editing Additional User Access Levels (continued)</u>

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

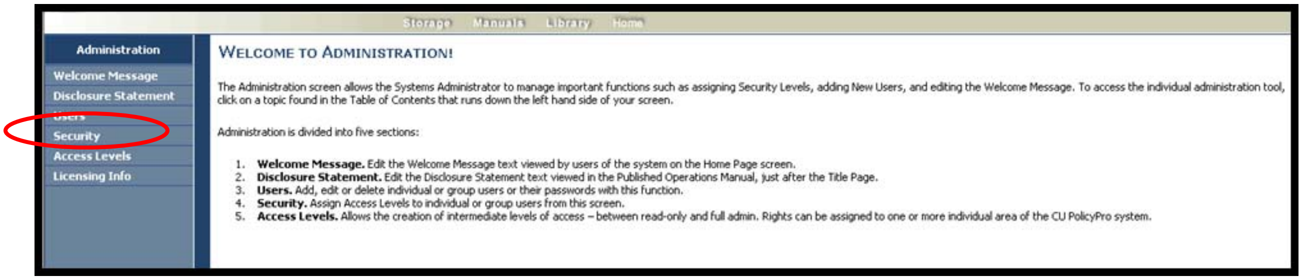
Once a new access level has been created, you can apply this user level to existing users either through the “Users” tab or using the “Security” tab.

Administration

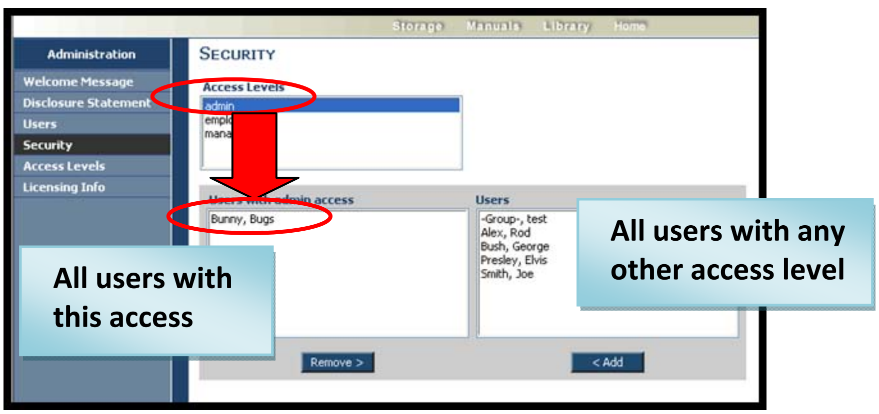
<u>Viewing/Editing Multiple Users at Once</u>

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.

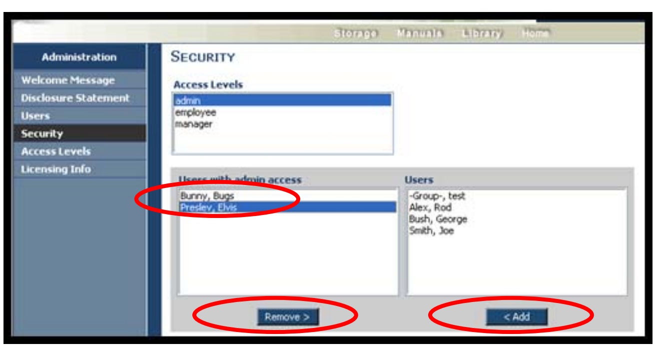
Click on the “Security” button on the left navigation.



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.

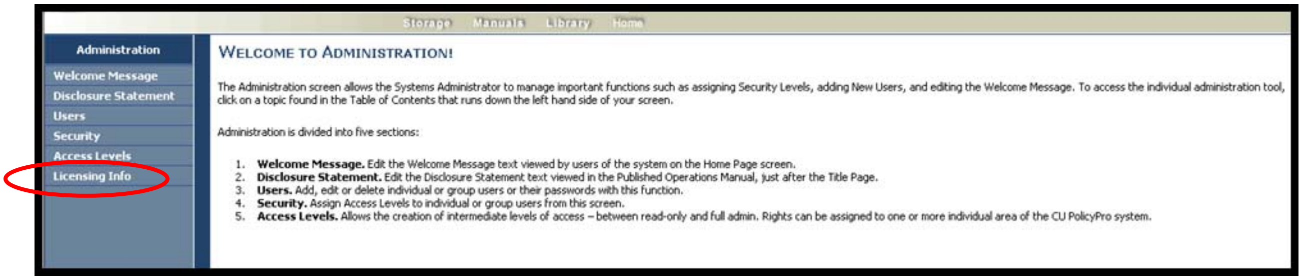


Tip: You will not see your own User Name. This prevents you from inadvertently removing yourself as an admin.

Administration

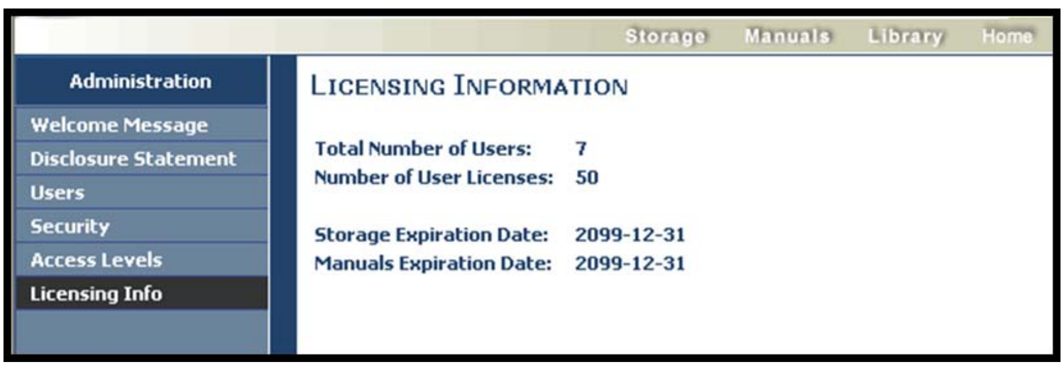
Viewing License and Subscription Information

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.

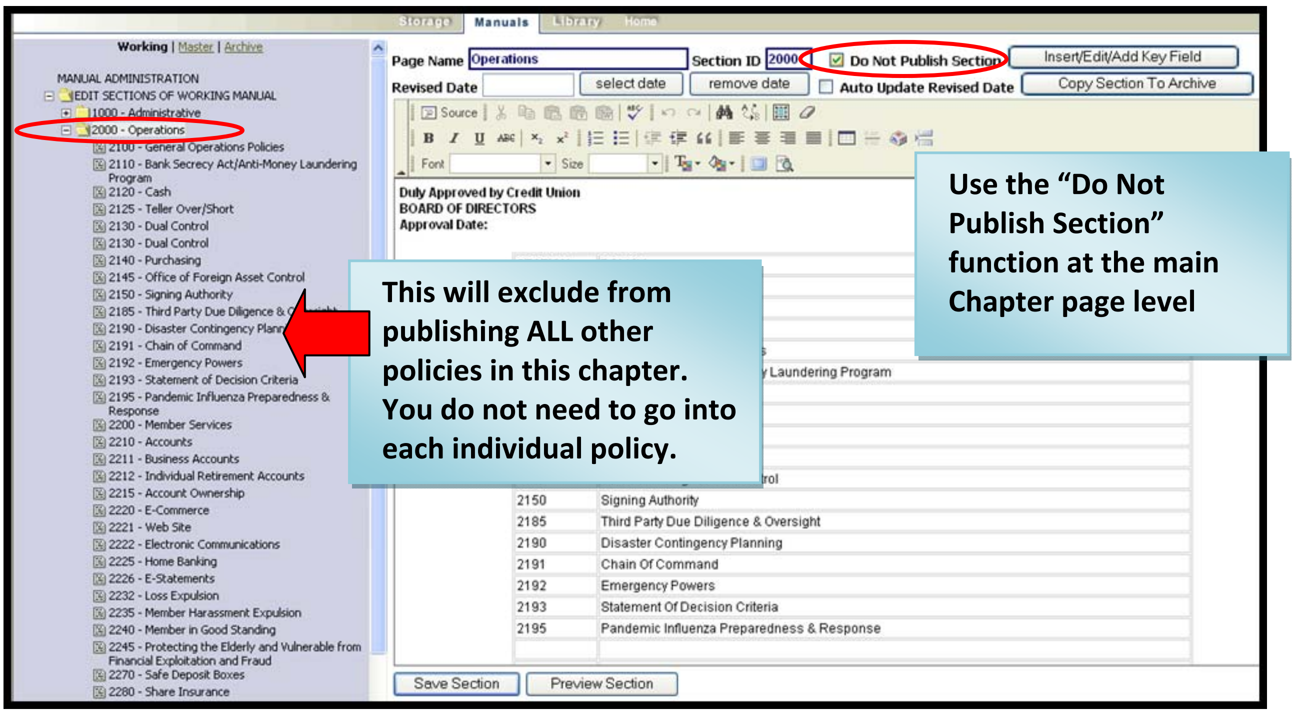
This will also display your subscription expiration date.



Additional Helpful Tips and Advanced User Functions

Excluding Entire Chapters from the Published Manuals

Many credit unions want to exclude one or more entire chapter from their manual as they focus in other areas of the manual. Using the "Do Not Publish Section" checkbox for the main Chapter page (ie. 1000, 2000, etc) will also exclude from publishing any policy within that chapter. **Remember you must save in order for this setting to take effect**.



Publishing and Printing Mini Manuals

Many credit unions find it helpful to publish "mini-manuals" for just the Lending Section, or just the FACTA Section, etc.

To do this, you will need to go into the main chapter page of all the other sections, and exclude each of the other sections from publishing (see above). For a manual with all 11 Chapters, this would entail going into the main Chapter page of the other 10 chapters to exclude and clicking the "Do Not Publish Section" checkbox and saving each one. This takes only a few minutes and is much faster than having to go into several hundred policies to exclude all but one specific chapter from publishing.

Once all the other chapters are excluded from publishing, publish your manual, and the published manual will contain only the single chapter that you have left for publishing.

Additional Helpful Tips and Advanced User Functions

Renaming Mini Manuals

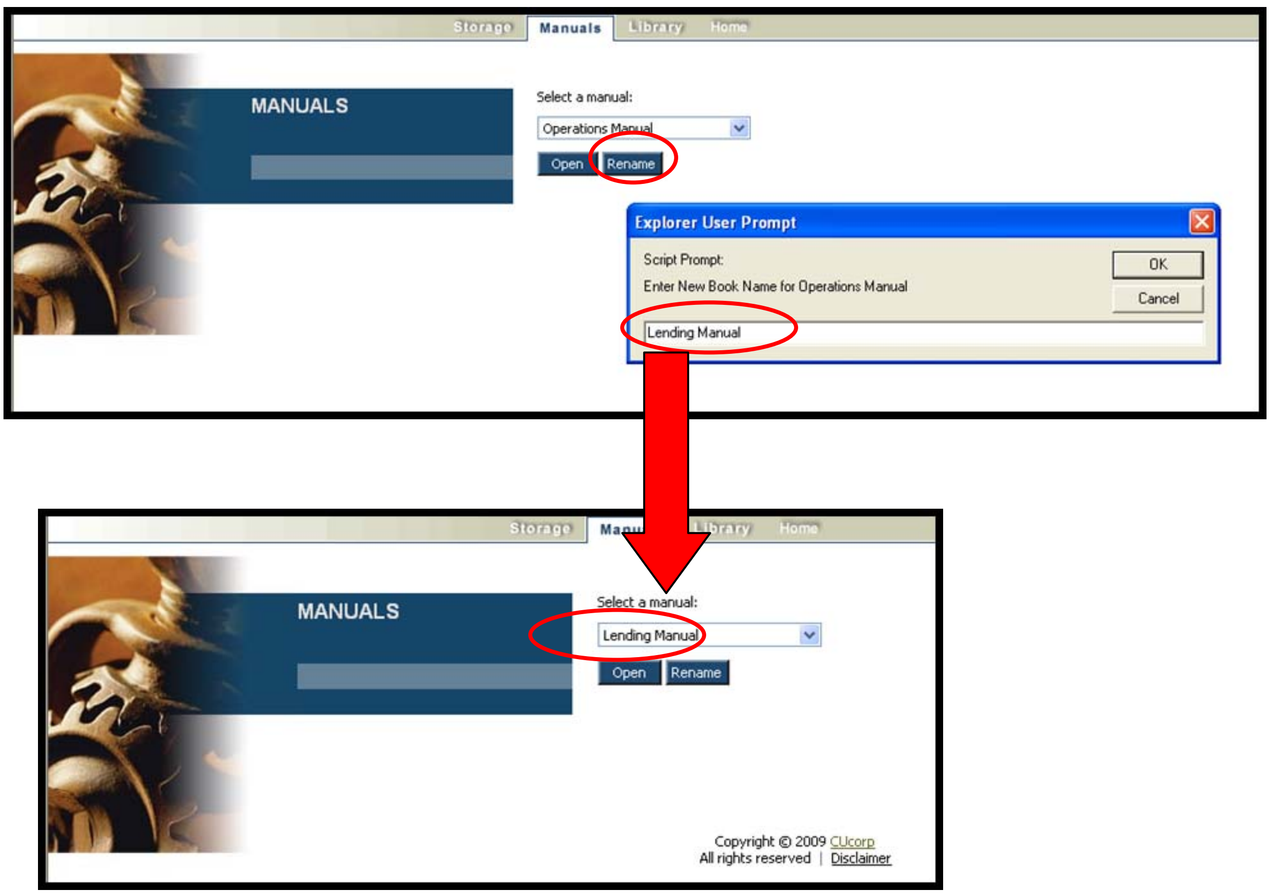
The Published Manual document will be named whatever name is given to your *Working Manual* (by default, this is called "Operations Manual"). If there are several published versions of your manual, whether the full *Working Manual*, or a mini-manual, it can be difficult to determine what content is included in each published version.

Renaming a manual prior to publishing can help you manage different published versions.

To rename a manual, go to the main Manual Builder page. This is where you "Open" your manual.

Before opening the manual, click the "Rename" button. In this example, a "Lending" manual will be created.

A pop up box will allow you to rename the manual. Type a name for your manual, the click OK.



Note: This simply renames your current Working Manual. It does not create a "new" or second version of your manual. There will still only be one manual selection for you to open.

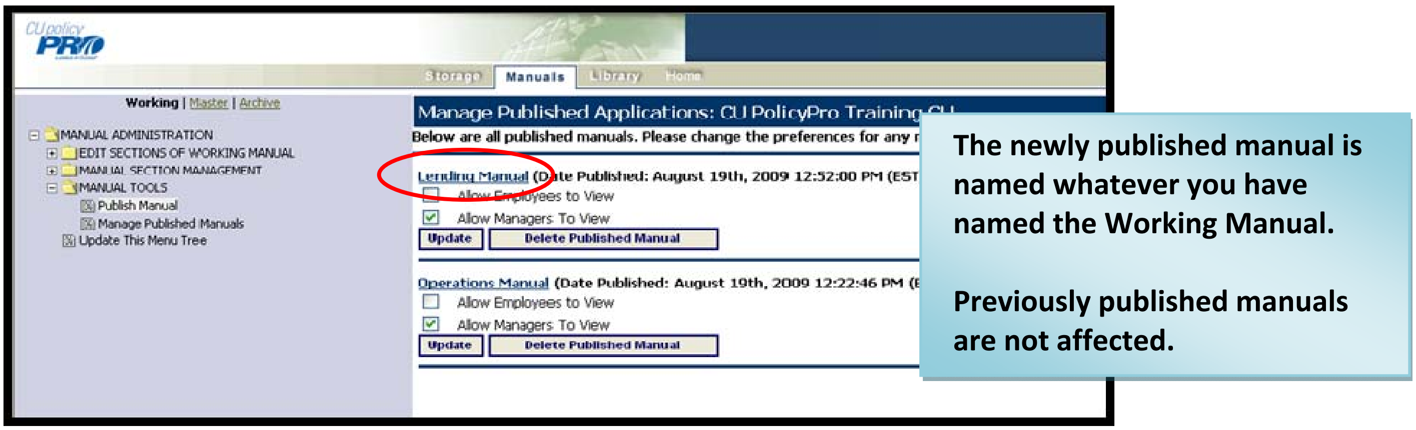
Additional Helpful Tips and Advanced User Functions

<u>Renaming Mini Manuals (continued)</u>

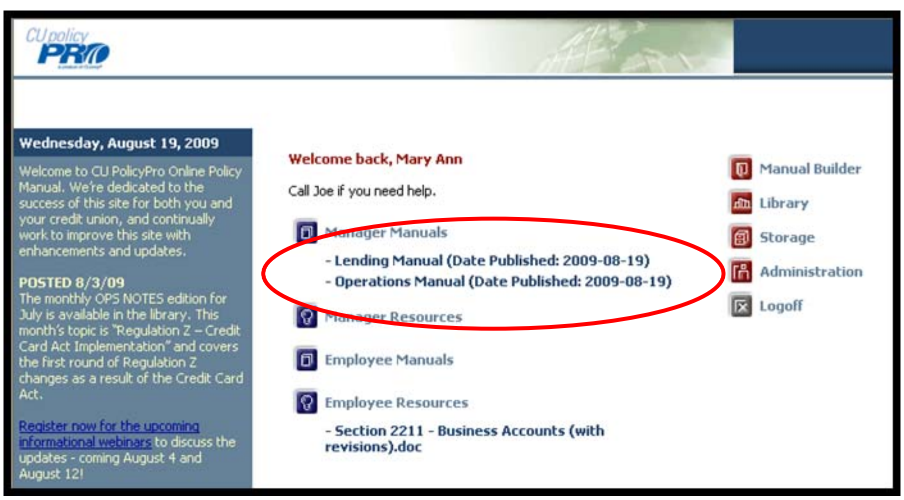
Once your manual is renamed, you can exclude from publishing all sections except Lending, then Publish the manual (if the sections have already been excluded, you can go directly to publishing).

When the manual is published, the link for the Published Manual is now called "Lending Manual"

This does not change the name or affect in any way previously published manuals.



If posted to the Home Page, it is easy for staff to distinguish the content for each manual.



Note: All manuals published from this point would be named "Lending Manual" until the name of the Working Manual was changed back or changed to another name.