|  |  |  |
| --- | --- | --- |
| **Location** | **Task/Notes** | **Result** |
| **HOME PAGE** (main screen when you login) | *Note: this is the “Front End” – the front end is typically “read only” access. Policies cannot be edited here.* |  |
|  | View Model Policies |  |
|  | Print a Model Policy |  |
|  | View CU Policies  Note: You will need to publish a manual under the “Dashboard” area before there will be policies to view |  |
|  | Print/Download a published manual |  |
|  | Edit CU Policies |  |
| Resources (tab on left side of screen) | Review items in Resources |  |
| **DASHBOARD** | *Note: this is the CMS area where users can manage policies, users and assignments* |  |
| CU Policies  (found under “Policies” in the left navigation) | *Note: the CU Policies area will be empty when you first login. You’ll need to add policies from the Model Policies area – we recommend 5-10 policies for testing.* |  |
|  | View CU policies |  |
|  | Print CU policies |  |
|  | Edit CU policies |  |
|  | Duplicate CU policies |  |
|  | View CU policy Logs *Note: the logs will have no information until you’ve made some edits. Recommend saving several edits before testing the logs area* |  |
|  | Delete CU policies |  |
|  | Add a chapter |  |
|  | Add new policies to a chapter |  |
|  | Define Key Fields at the policy level *Note: Policy 2110 is a good policy to add to test Key Fields* |  |
| Import Model Policies  (see tabs in upper right when you are in the CU Policies or Model Policies area) | Import model policies |  |
| Move Policies  (see tabs in upper right when you are in the CU Policies area) | Move policies |  |
| Reorder Policies  (see tabs in upper right when you are in the CU Policies area) | Reorder policies within a chapter |  |
|  | Reorder chapters |  |
| Manage Policy Dates  (see tabs in upper right when you are in the CU Policies area) | Modify Dates |  |
| Model Policies (found under “Policies” in the left navigation) | View model policies |  |
|  | Print model policies |  |
| Archived Policies (found under “Policies” in the left navigation) | View and Restore older versions of policies |  |
| Restore Deleted Policies (see tabs in upper right when you are in the Archived Policies area) | Restore deleted policies |  |
| Publishing  (found under “Policies” in the left navigation) | Publish a new manual |  |
|  | View manual (in Admin area) Note: this is a good time to go back to the top of this checklist and view items on the front end of the site |  |
|  | Download manual as PDF |  |
|  | Download manual as Word doc |  |
|  | Print published manual |  |
|  | Delete manual |  |
| Key Fields This is the full database of Key Fields  (found under “Policies” in the left navigation) | Define key fields in the Key Fields database Note 1: make sure to click Save at the bottom of the page  Note 2: if there are no key fields in the database, add model policy 2110 and try again |  |
| Files  (found on the left navigation) | Add subfolder under Resources and add a few files to that subfolder |  |
|  | View files on Front End under “Resources” |  |
|  | Rename files |  |
|  | Move files |  |
|  | Delete files |  |
| Assignments  (found in the left navigation under “Modules) | Create assignments (assign to yourself) |  |
|  | Edit assignments |  |
|  | Duplicate assignments |  |
|  | Mark some assignments as completed |  |
|  | Delete an assignment |  |
| View Assignments on the Home Page | View assignments you just created |  |
|  | Mark some assignments as completed |  |
| Search (top right) | Review Search function |  |
| Forgotten password function | Test resetting of password |  |

Additional Comments and Suggestions: