PREPARING FOR THE CU POLICYPRO MIGRATION



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REVIEW YOUR USERS

- Remove users who are no longer at the CU or who no longer need access
- Update Email Addresses if needed
- Update First and Last Name if needed



REVIEW CU POLICIES

- Remove any policies that have not been customized for your CU
- Remove any policies not in use by your CU
- Remove any duplicate policies



REVIEW ARCHIVED POLICIES

• Delete any archived policies that are no longer relevant and would not need to be accessed in the future



REVIEW PUBLISHED MANUALS

 Delete any published documents that are no longer relevant and would not need to be accessed in the future



REVIEW DOCUMENTS

• Delete any documents under CU Documents that are out of date or no longer relevant and would not need to be accessed in the future

CUPolicyPr

Review Your Users

- Remove users who are no longer at the CU or who no longer need access
- Update Email Addresses if needed
- Update First and Last Name if needed

Instructions

- 1. Click on "Administration" in the top navigation.
- 2. 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.

CU policy	CU PolicyPro > Administration Logged in as: CU PolicyPro Support Access Level: admin		
	Policies Resources CU Document Administration Training/Support Home		
Administration			
Welcome Message	123 Training CU: WELCOME TO ADMINISTRATION!		
Disclosure Statement	The Administration screen allows the 123 Training CU Systems Administrator to manage important functions such as assigning Security Levels, adding New Users, and editing the Welcome Message. To access the individual administration tool, click on a topic found in the navigation to the left.		
Users	Administration is divided into the following sections:		
Security	 Welcome Message. Edit the Welcome Message text viewed by users of the system on the Home Page screen. Disclosure Statement. Edit the Disclosure Statement text viewed in the Published Operations Manual, just after the Title Page. Users. Add. edit or delete individual or aroung users or their passwords with this function. 		
Access Levels	 Security. View users and access levels, and assign Access Levels to individual or group users from this screen. Access Levels. Allows the creation of intermediate levels of access - between read-only and full admin. Rights can be assigned to one or more individual 		
Licensing Information	area of the CU PolicyPro CU PolicyPro system. 6. Licensing Info. This will show your current number of users assigned and the total number of user licenses available. This also shows your subscription		
Default Print Font	expiration date. 7. Corporate Logo. This allows a logo to be uploaded for use on the Published Manual title page.		
Corporate Logo/Name			

- 3. If applicable, update the user's First or Last Name, or Email Address. After any changes are made, click the "Save" button.
- 4. To delete a user, click the "Delete" button. This will permanently delete this user.

Users User: Jetson, George V				New Delete Save
User Name: Last Name:	gjetson@123cu.org Jetson	First: George	M.I.:	
Password (if changing, please fill in): Re-Type Password:	Passwords are encrypted be updated by filling in the least 6 characters and inc	and are not visible, hower e password fields and sav lude one capital letter and	rer, passwords can ing the form. Passwords must b 1 one number.	e at
Access Level:	admin 🗸			
<i>Optional Fields</i> E-Mail:	gjetson@123cu.org]		

Review CU Policies

- Remove any policies that have not been customized for your CU
- Remove any policies not in use by your CU
- Remove any duplicate policies

Instructions

1. Click on "Policies" in the top navigation.

CU policy	CU PolicyPro > Home 123 Training CU Policies Resources CU Documents Administration Training/Support Home	Logged in as: CU PolicyPro Support Access Level: admin Change Password Cogout

2. Click on the "CU Policies" tab at the top left of the screen to make sure you are in the CU Policies Manual.

CU policy	CU PolicyPro > Manual > 123 Training CU: 123 Training CU Policies 123 Training CU		
	Policies Resources CU Documents Administration Training/Support Home		
CU Policies Model Policies	Archived Policies		
Search CU Policies:	Search		

- 3. A policy can be deleted one of two ways: At the individual policy level, which allows you delete a single policy, or using the Delete Policies utility, which allows you to archive multiple polices at once.
- 4. To delete Multiple Policies at one time:
 - a. Using the plus signs to the left of each folder, expand the "MANUAL ADMINISTRATION" and the "MANAGE POLICIES & SETTINGS" folders.
 - b. Click on the "Delete Policies" link in the "MANAGE POLICIES & SETTINGS" folder.
 - c. On the right side of the screen, a full list of all policies in the CU Policies will appear, with a checkbox next to each policy.

d. Click the checkbox next to each policy you want to remove.

CU Policies Model Policies Archived Policies	
Search CU Policies: Search	Delete Policies
MANUAL ADMINISTRATION Add Model Policies to CU Policies Manual Add Unique Policies and Chapters Add Unique Policies Add Unique Policies Add Unique Policies Add Unique Policies Add Unique Policies Add Unique Policies Add Unique Policies Add Unique Policies Add Unique Policies Add Unique Policies Add Unique Policies Add Unique Policies Add Unique Poli	Check one or more policies below and click the " <i>Delete"</i> button to del Note: If you remove a top level chapter (i.e. 1000, 2000), you will no level chapter in your manual unless you will never be using any policies
Manage Date Setting Manage Publishing Setting Archive Policies Delete Policies PUBLISHING TOOLS REPORTS Update This Menu Tree	Select/Deselect All 1000: Administrative 1100: Leadership 1140: Credit Union History 1160: Strategic Planning 1205: Board of Director's Duties 1300: Audits
	 1400: Legal Counsel 1500: Staffing 2000: Operations 2100: General Operations Policies 2110: Bank Secrecy Act/Anti-Money Laundering Program

e. Scroll to the end of the page and click the "Delete" button.

11010: Risk Based Pricing		
\square 11012: Disclosure Of Information To Victims Of Identity Theft		
11015: Obtaining and Using Medical Information		
11016: Affiliate Marketing Rules		
Delete		

Review Archived Policies

• Delete any archived policies that are no longer relevant and would not need to be accessed in the future

Instructions

1. Click on "Policies" in the top navigation.

CU policy	CU PolicyPro > Home 123 Training CU Policies Resources CU Documents Administration Training/Support Home	Logged in as: CU PolicyPro Support Access Level: admin Change Password Cogout

2. Click on the "Archived Policies" tab at the top left of the screen to make sure you are in the Archived Policies area.

CU policy	CU PolicyPro > Manual > 123 Training CU: 123 Training CU Policies 123 Training CU
	Policies Resources CU Documents Administration Training/Support Home
CU Policies Model Policies	Archived Policies
Search CU Policies: Search	

- 3. An archived Policy can be deleted one of two ways: At the individual archived policy level, which allows you to view the content of the archived policy before deletion, or using the Delete Archived Policies Utility, which allows you to delete multiple archived policies at one time.
- 4. To delete a single archived policy:
 - a. Using the plus signs to the left of each folder, expand the "ARCHIVE ADMINISTRATION" and the "ARCHIVED POLICIES" folders. A listing of all archived policies is available underneath the "ARCHIVED POLICIES" folder.
 - b. Click on the archived policy that you want to delete.
 - c. The text of the archived policy will appear on the right side of the screen.
 - d. Click the "Delete Archived Policy" button above the content.

Delete Archived Policy Restore to CU Policies Manual
Archive Date: March 20, 2016
Archive Policy 1150: Field of Membership
Model Policy Revised Date: 06/01/2008 Model Policy Reviewed Date: 06/27/2014
1. FIELD OF MEMBERSHIP

- e. A confirmation box will pop up asking you to confirm the deletion. Click OK.
- 5. To delete multiple archived policies at one time:
 - a. Click on the "Delete Archived Policies" link in the navigation. This is found under the listing of the archived policies in the "ARCHIVED POLICIES" folder (if your archive is very full, you may need to scroll to see this link).
 - b. A list of all policies currently in the Archive will appear on the right side of the screen, with a checkbox next to each.
 - c. Check the checkbox next to each archived policy that should be deleted.
 - d. Click the "Delete" button.
 - e. A confirmation box will pop up asking you to confirm the deletion. Click OK.

CU Policies Model Policies Archived Policies	
CU Policies Model Policies Archived Policies Sort Archived Items By: Hame Humber Date Search Archive: Search Search Archive: Search ArcHive ADMINISTRATION P ARCHIVE POLICIES Search Archived Policies Search Archived Policies Search Archived Policies	Selected archived Policies Selected archived policies have been deleted from your manual. Update instructions: Check the policies below and click the "DELETE" button to delete Select/Deselect Al 3130: Fixed Assets (archived: 2016-03-26 13:33:07) 1000: Administrative (archived: 2016-03-26 13:32:49) 1150: Field of Membership (archived: 2016-03-26 09:57:36) 1120: Vision Statement (archived: 2016-03-25 10:24:37) 120: Usion Statement (archived: 2016-03-25 10:24:37)
	1530: Employee Use of Social Media (archived: 2016-02-25 18:43:13) 1531: Credit Union Use of Social Media (archived: 2016-02-25 18:43:13) 2000: Operations (archived: 2016-02-25 18:43:13) 2120: Cash (archived: 2016-02-25 18:43:13) 2122: Teller Over/Short (archived: 2016-02-25 18:43:13) Delete

Review Published Documents

• Delete any published documents that are no longer relevant and would not need to be accessed in the future

Instructions

1. Click on "Policies" in the top navigation.

CU policy PRIO	CU PolicyPro > Home 123 Training CU Policies Resources CU Documents Administration Training/Support Home	Logged in as: CU PolicyPro Support Access Level: admin Change Password School Logout

2. Click on the "CU Policies" tab at the top left of the screen to make sure you are in the CU Policies Manual.

CU policy		CU PolicyPro > Manual > 123 Training CU: 123 Training CU Policies 123 Training CU	
		Policies Resources CU Documents Administration Training/Support Home	
CU Policies	Model Policies	Archived Policies	
Searc	ch CU Policies:	Search	

- 3. Using the plus signs to the left of each folder, expand the "MANUAL ADMINISTRATION" and the "PUBLISHING TOOLS" folders.
- 4. Click "Delete Published Documents" in the "PUBLISHING TOOLS" folder.
- 5. A list of all published manuals will show on the right side of the screen.
- 6. Click the checkbox next to any published manual you wish to delete.
- 7. Click the "Delete" button at the bottom of the screen. Note: Deleted manuals cannot be recovered.

CU Policies Model Policies Archived Policies	Operations Manual (published: March 25th, 2016 06:11:00 AM) Operations Manual (published: March 25th, 2016 04:25:26 AM)
Search CU Policies: Search	Operations Manual (published: March 24th, 2016 01:43:37 PM) Operations Manual (published: March 24th, 2016 01:40:39 PM) Operations Manual (published: March 24th, 2016 08:06:24 AM)
MANUAL ADMINISTRATION DEDIT CU POLICIES MANAGE POLICIES & SETTINGS MANAGE POLICIES MANAGE MAN	□ Operations Manual (published: March 23rd, 2016 01:44:17 PM) ☑ Operations Manual (published: March 23rd, 2016 01:42:47 PM) ☑ Operations Manual - Historical Verson as of 12/31/15 (published: P □ Policies for Examiners to Review (published: February 25th, 2016 0 □ Operations Manual (published: February 12th, 2016 06:13:29 AM) ☑ Operations Manual (published: February 9th, 2016 12:52:37 PM) ☑ Itile of Document (published: February 9th, 2016 09:22:04 AM) □ Delete

Review Documents

• Delete any documents under CU Documents that are out of date or no longer relevant and would not need to be accessed in the future

Instructions

1. Click on "CU Documents" in the top navigation to access the CU Documents area.

CU policy PR/O	CU PolicyPro > CU Documents 123 Training CU Policies Resources CU Documents Administration Training/Support Home	Logged in as: CU PolicyPro Support Access Level: admin Change Password S Logout				
	CU Documents The CU Documents area allows users to upload files and store them within CU PolicyPro. Documents can be stored in the CU Documents area, or posted on the CU PolicyPro homepage by uploading them to the "Manager Resources" or "Employee Resources" folders. Note: All documents placed in the "Manager Resources" folder will be available on the home page to users with access to "Manager Resources" folders will be available on the home page to all users who have access to the system. Documents placed in any other folder are only available through the CU Documents area.					

2. To delete a document from the CU Documents area, click the Delete ("X") icon to the far right of the file name. This will permanently delete the document from the CU Documents area.

		Current Folder: /Employee Resources			
Folders	New Folder	Name	<u>Size</u>	Last Modified	
🛅 Root		Policies to Review.docx	13k	Apr 12, 2018 9:38 AM	🖌 🖻 🗳 🗙
 Employee Resources Manager Resources 		Policy 10004 - Table 4 - Electronic Funds Transfer Records - REDLINED.docx	17.89k	Sep 26, 2017 10:03 AM	e⁄ 🖻 🗟 🗙
opsfiles thumbs images					