PREPARING FOR

THE CU POLICYPRO MIGRATION

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- Delete any documents under CU Documents that are out of date or no longer relevant and would not need to be accessed in the future

CUPolicyPro

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.
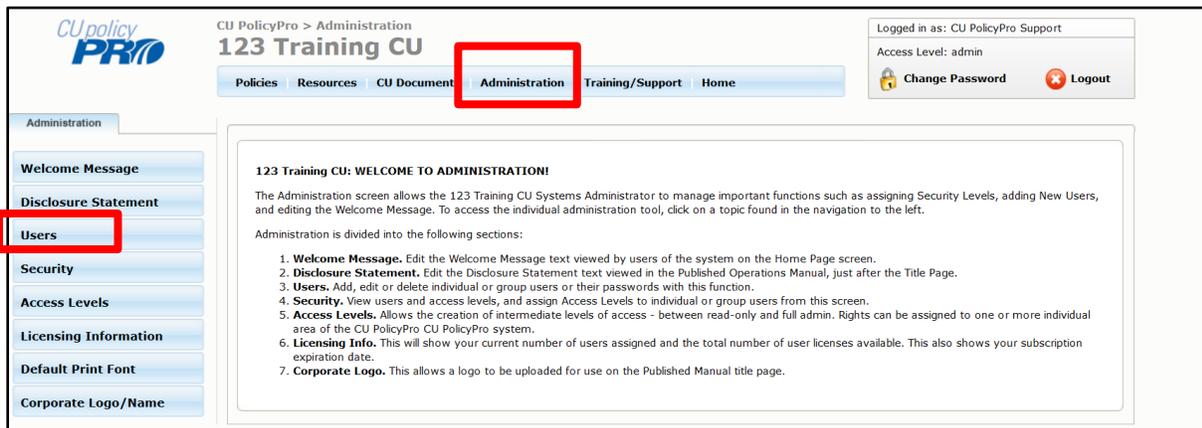
3. If applicable, update the user's First or Last Name, or Email Address. After any changes are made, click the "Save" button.

4. To delete a user, click the "Delete" button. This will permanently delete this user.

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.

2. Click on the "CU Policies" tab at the top left of the screen to make sure you are in the CU Policies Manual.
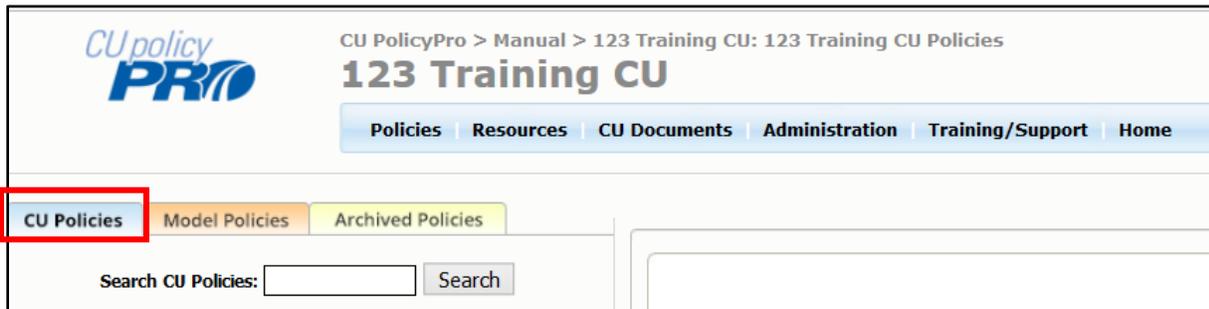
3. A policy can be deleted one of two ways: At the individual policy level, which allows you delete a single policy, or using the Delete Policies utility, which allows you to archive multiple polices at once.

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.

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

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.

2. Click on the "Archived Policies" tab at the top left of the screen to make sure you are in the Archived Policies area.
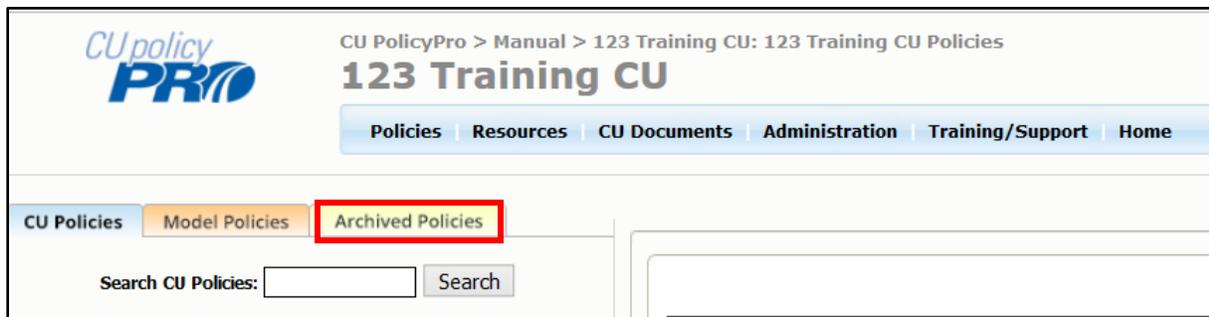
3. An archived Policy can be deleted one of two ways: At the individual archived policy level, which allows you to view the content of the archived policy before deletion, or using the Delete Archived Policies Utility, which allows you to delete multiple archived policies at one time.

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.
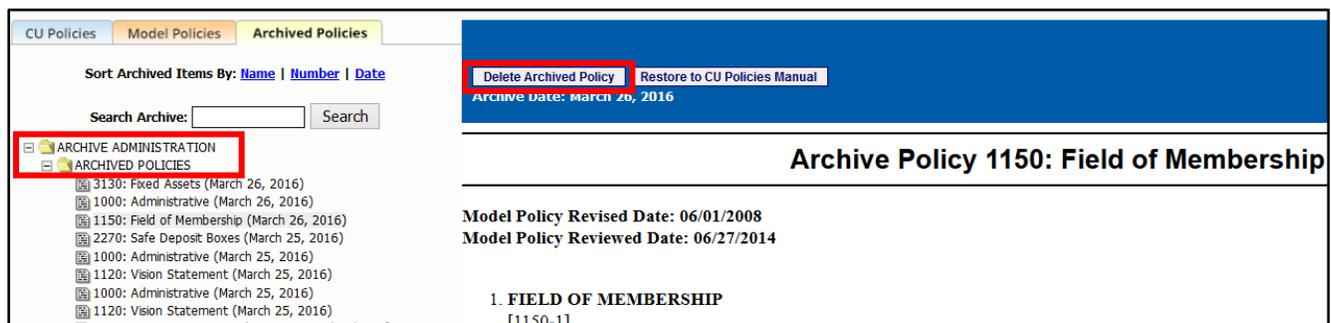
e. A confirmation box will pop up asking you to confirm the deletion. Click OK.

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.
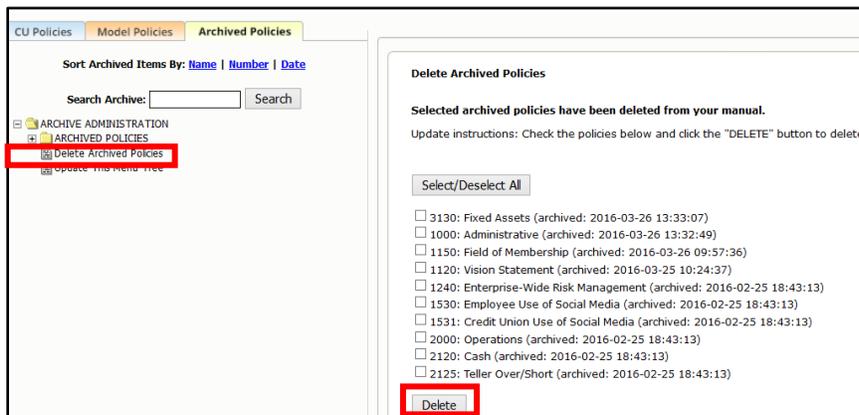
Review Published Documents

- 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.

2. Click on the "CU Policies" tab at the top left of the screen to make sure you are in the CU Policies Manual.
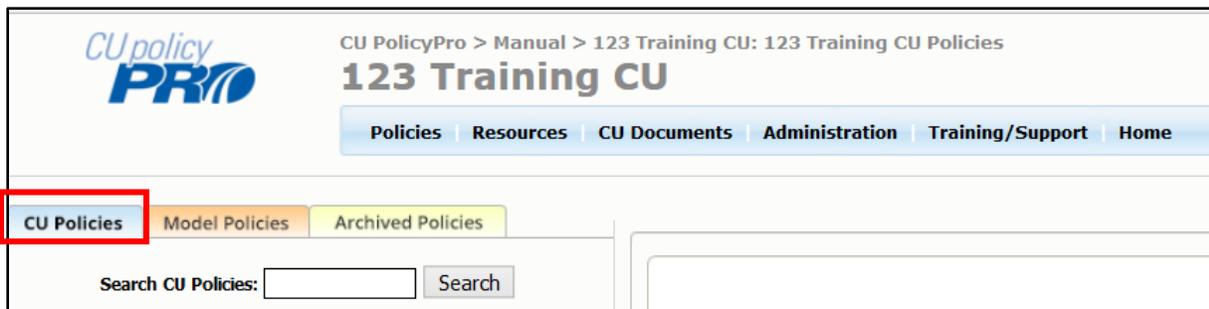
3. Using the plus signs to the left of each folder, expand the "MANUAL ADMINISTRATION" and the "PUBLISHING TOOLS" folders.

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.

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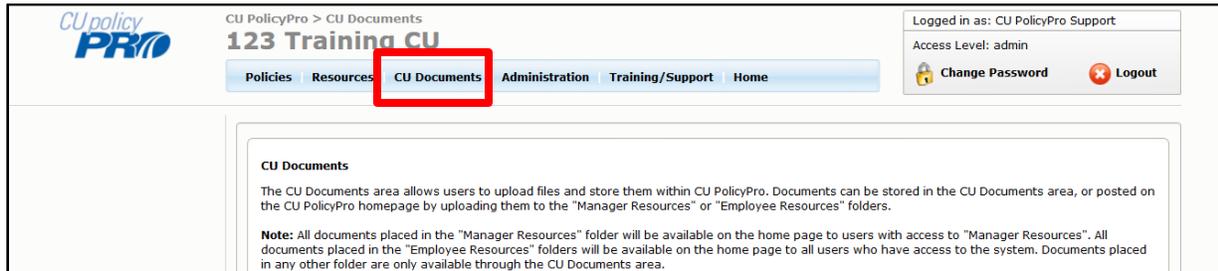
2. To delete a document from the CU Documents area, click the Delete ("X") icon to the far right of the file name. This will permanently delete the document from the CU Documents area.