



New System FAQs

How do I login to the new site?

The new system provides a unique URL for each credit union. [Click here to find your credit union's link!](#)

If you're not sure of your password, use the forgotten password link on the login page. If you have trouble logging in or do not receive a password reset email within 10 minutes of requesting it, please contact our support staff at policysupport@cusolutionsgroup.com.

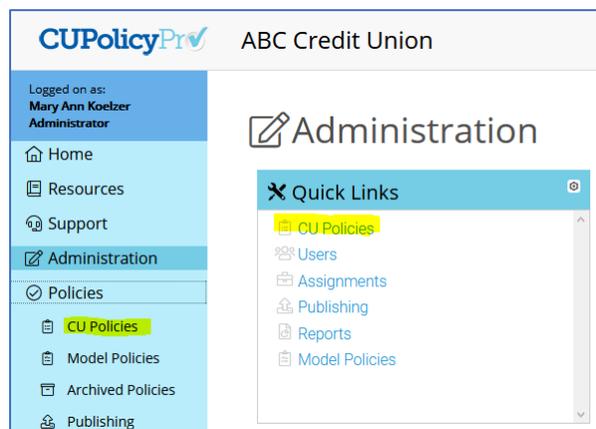
Why didn't I get the password reset email?

Some firewalls will prevent automated emails from getting through unless the domain is whitelisted, so we recommend whitelisting @leagueinfosight.com as that is where the system emails will originate from. If you do not receive your password reset email within 10 minutes of requesting it, please contact our support team at policysupport@cusolutionsgroup.com and we can manually reset the

Where are my policies?

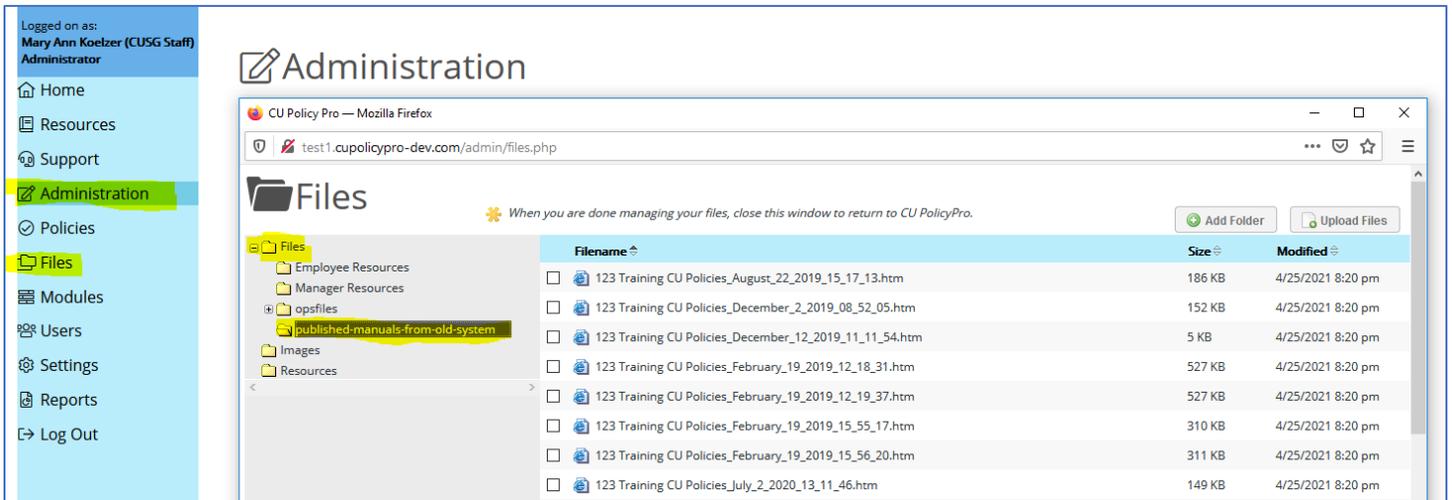
CU Policies migrated from the old system are available for editing in the *Administration* area. Click on the "CU Policies" link either in the Quick Links section, or under Policies on the left navigation menu.

If you do not see your CU Policies, contact policysupport@cusolutionsgroup.com for assistance.



Where are my published manuals from the old system? There are no manuals under “Publishing.”

Published Manuals from the old system are imported as part of the documents migration and are found in the *Administration* area under Files. A folder called “published-manuals-from-the-old-system” houses all of these documents.



The screenshot shows the Administration Files page in CU PolicyPro. The left sidebar contains navigation links: Home, Resources, Support, Administration (highlighted), Policies, Files (highlighted), Modules, Users, Settings, Reports, and Log Out. The main content area displays a file browser interface with a table of files. The table has columns for Filename, Size, and Modified. The files listed are training manuals from August 2019, December 2019, February 2019, and July 2020. A folder named "published-manuals-from-the-old-system" is highlighted in the left sidebar.

Filename	Size	Modified
123 Training CU Policies_August_22_2019_15_17_13.htm	186 KB	4/25/2021 8:20 pm
123 Training CU Policies_December_2_2019_08_52_05.htm	152 KB	4/25/2021 8:20 pm
123 Training CU Policies_December_12_2019_11_11_54.htm	5 KB	4/25/2021 8:20 pm
123 Training CU Policies_February_19_2019_12_18_31.htm	527 KB	4/25/2021 8:20 pm
123 Training CU Policies_February_19_2019_12_19_37.htm	527 KB	4/25/2021 8:20 pm
123 Training CU Policies_February_19_2019_15_55_17.htm	310 KB	4/25/2021 8:20 pm
123 Training CU Policies_February_19_2019_15_56_20.htm	311 KB	4/25/2021 8:20 pm
123 Training CU Policies_July_2_2020_13_11_46.htm	149 KB	4/25/2021 8:20 pm

Why aren't the published manuals from the old system just added to Publishing?

Published manuals are documents that are created and housed in CU PolicyPro. When the published manual is created, it is a point-in-time capture of the policy content and is not a synchronized or connected to the policies. The publishing process in the new system has additional features and is programmed a bit differently than publishing in the old system, although the end document does look very similar. Unfortunately the old published manuals are not compatible with the way the new system creates the published manuals so they cannot reside in that area.

How can I allow my staff or board to view the published manuals from the old system?

This can be accomplished one of two ways, or a combination of both, depending on your needs. Either option allows you to set access restrictions (if desired) to determine who can see the published manuals. Our staff is happy to assist if you have any questions or need assistance.

1. Re-publish your policies in the new system. See the *Publishing CU Policies* quick guide in the Support area of CU PolicyPro for information on how to publish in the new system. This method will provide published manuals in the location and format that is most familiar. This works very well if the policies you want to provide to staff are the most current version of the policies in the CU Policies manual.
2. Move published manuals from the old system to the “Resources” area of the site. This method works well if older published manuals contain policy content that has changed since the manual was published. For instructions on how to do this, please see the *Uploading Files and Resources* quick guide in the Support area of CU PolicyPro, or contact our support staff at policysupport@cusolutionsgroup.com for assistance.

How do I add additional users?

Users are added in *Administration* area under “Users”. We recommend reading the *Managing Users* quick guide in the Support area of CU PolicyPro for more information on managing user and user access rights.

Why don't my users have the same level of access as the old system?

Because of the enhanced access settings in the new system, custom levels of access could not be migrated. All users who were employee-level access, or any custom level of access, have been migrated as basic-level users. These users may need to have their access reviewed and updated by an admin in the new system.

How do I add my logo for publishing?

Your logo can be made available for publishing by uploading the logo under *Settings*, which is found in the *Administration* area of CU PolicyPro. Note: only admin-level users can access *Settings*.

How do I change my credit union name on the site?

Your credit union name can be updated under *Settings*, which is found in the *Administration* area of CU PolicyPro. Note: only admin-level users can access *Settings*.

Is there a limit to our number of users in the system?

No, you can add as many users as your credit union needs.

Can we restrict access at different levels? For instance, can we set some users to make modifications, and other users to just be able to view?

Yes, there are five different access default access levels to help you set up your users with the correct access. In addition to the base access levels, you can add one or more **User Groups** to any user which allows you to add additional viewing and/or administrative rights on top of their base access level. Please take a look at the *Managing Users Quick Guide* in the Support area of CU PolicyPro. This will walk you through the various access levels and how to create user groups and assign rights. If you have any questions once you've gone through the guide, please let us know!

Can we periodically export and back up all our data that is in CU Policy Pro, so that we can keep a copy locally?

Yes, there is a process called Publishing which allows you to take any of the policies in your manual and put them into a printable document, which in the system we call a “published manual.” Any published manual can be downloaded to PDF (or Word) and stored externally from the site. Published manuals can also be assigned to one or more Groups (see above) or to “any user” to allow you to provide specific published manuals to users that you want to be able to view them. Please take a look at the Publishing Policies quick guide in the Support area of CU PolicyPro. This will walk you through the publishing process and the various options that can be applied to a published manual. If you have any questions once you've gone through the guide, please let us know!

How would I provide our policies to our examiners through CU PolicyPro?

We recommend publishing a manual that includes any policies you want to provide to the examiners (this may include some or all policies). For more information on creating a published manual, please review the *Publishing CU Policies* Quick Guide in the Support area.

One published you can:

- Download a pdf of the published manual to provide to the examiners, or
- Create a login that the examiners can use to access the published manual through CU PolicyPro. We recommend setting up the examiners with “Limited” access, and adding a user group called “Examiners” (or something similar) then add rights for that user group to the published manual so the examiners can access it. Remember that if the examiners are set up with access to CU PolicyPro, they would also see any published manuals or Resources that are available for “All Logged In Users” to see. For more information on creating users and user groups, please review the *Managing Users* Quick Guide in the Support area.

Can you explain more about the *Reviewer* level of access?

While users with *Reviewer* access cannot by default edit policies, it is a fairly high level of access because a Reviewer-level user can **view all policies** in the CU PolicyPro system. This includes all policies in CU Policies (which may include policies that are retired, not in use, or in-process and/or not yet board approved) and any active published manuals (regardless of any user groups applied to the published manual). While this level of access will certainly be an appropriate level for many users of CU PolicyPro, credit unions may also wish to consider creating Basic or Limited level users and using groups to provide access to specific policies, either through published manuals or through the per-policy-access options.