

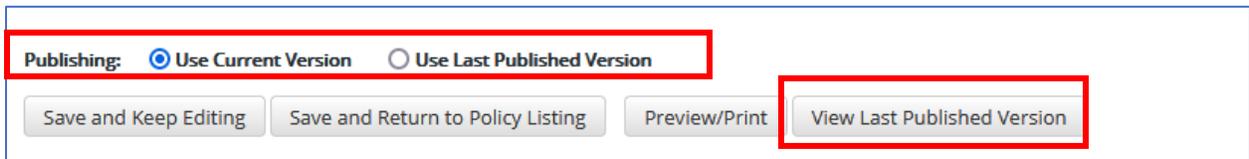
## New CU PolicyPro Enhancement – Publishing

We have exciting news! The Publishing function in CU PolicyPro has been updated to include new features. A listing of the new features is below, followed by a more detailed look at each one.

- A new publishing setting at the policy level allows users to choose the “Current” or “Last Published Version” of a policy for their published manuals
- A new multi-policy selection option allows users to select the publishing setting for multiple policies at one time
- When publishing:
  - An indicator icon will show which policies are set to “Use Last Published Version”
  - Additional text can be added to the title page
  - The table of contents at the beginning of each chapter can be suppressed
- Deleted published manuals can now be restored

## New Publishing Setting – Use *Current Version* or Use *Last Published Version*

- The new publishing setting allows users to set a policy to use the “Current” version (the content currently in the editor) or the “Last Published Version,” which will use the policy content at the time that policy was last published. The “Last Published Version” is especially helpful for a policy that is in-process – the user wants to include the policy in the published manual but wants to use the previously published version of the content instead of the in-process content.
- This new setting is found near the bottom of the screen when editing a policy. The setting will determine if the current or previously published version should be used when publishing. The default setting is “Use Current Version.” If the policy has never been published, the “Use Last Published Version” option cannot be selected.
- A new action button allows users to view the last published version of the policy. If the policy has never been published, this action cannot be selected.
- The Current Version and Last Published version can be the same (if no edits have been made to the policy since the last publish).
- The Preview/Print action button will continue to show the current version of the policy regardless of the publishing setting.



The screenshot shows a user interface for editing a policy. At the top, there is a "Publishing:" section with two radio button options: "Use Current Version" (which is selected) and "Use Last Published Version". Below this, there are four buttons: "Save and Keep Editing", "Save and Return to Policy Listing", "Preview/Print", and "View Last Published Version". The "View Last Published Version" button is highlighted with a red box.

- When viewing a previously published version, the header at the top of screen will indicate that it is the last published version and will also display the date the policy was last published.

Close this tab to return to editing mode.

**Viewing Published Version From 8/24/2021 9:12 am**

Print

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**Policy 1400: Legal Counsel**

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**Reviewed Date: 4/30/2021**

- The CU Policies manual will indicate with a yellow asterisk any policy set to use the last published version of the content.

Expand All | Collapse All

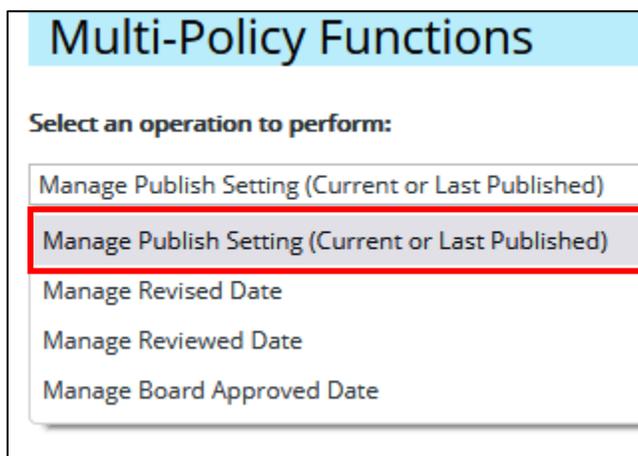
- Administrative (1000) ▾
  - \*** Compensation, Reimbursement, and Indemnification (1210) ▶
  - Credit Union Culture (1100) ▶
  - Operations (1240) ▶
  - Equal Opportunity Statement (1170) ▶
  - Organization (1200) ▶
  - Legal Counsel (1400) ▶
  - Staffing (1500) ▶
  - Whistleblowing Protection Policy (1505) ▶
  - Nepotism (1510) ▶

## New Multi-Policy Selection Option – Select the Publishing Setting for Multiple Policies at One Time

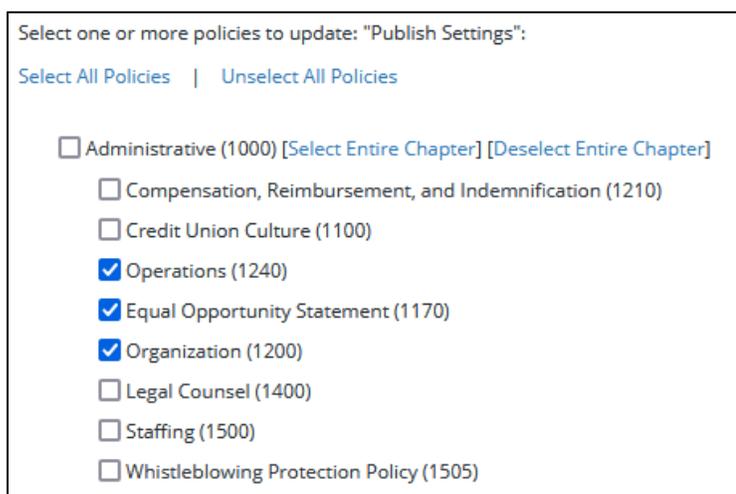
- In addition to the ability to change the publishing setting at the individual policy level, users can also change this setting for multiple policies at one time. This is found in the CU Policies manual under the **Multi-Policy Functions** tab (this tab was previously titled *Manage Policy Dates*).



- Users can now choose which function they want to apply to multiple policies (managing the publishing setting or managing the reviewed, revised or board approved date fields).



- Once "Manage Publishing Setting" is selected, a list of all policies in the CU Policies manual will be displayed. Check the box next to each policy that will have its publishing setting updated, then scroll to the bottom of the list and click "Next."



- Once the policies have been selected, choose which publishing setting to apply to those policies and click the “Update” button. This function will only update the selected policies. The publishing setting for all other policies will remain unchanged.

**Note: if a policy is selected that has never been published, the setting will remain as “Use Current Version,” regardless of the setting chosen by the user.**

Field: **Content Publishing Mode**

Policies Affected: **3** ([Show Policy List](#))

*Note: Your selection will override the existing publishing setting for each policy that has been previously published will remain set to “Use Current Version” regardless of your selection below.*

**Publishing Setting:**

Set to: Use Current Version

**Set to: Use Current Version**

Set to: Use Last-Published Version

### When Publishing – An Indicator Icon Will Show Which Policies are Set to “Use Last Published Version”

- When choosing which policies to include in a published manual, a yellow asterisk next to a policy will indicate it is currently set to use the last published version.

**Select Policies**

Select one or more policies to include in published manual.

**\* Indicates the last published version will be used.**

[Select All Policies](#) | [Unselect All Policies](#)

- Administrative (1000) [[Select Entire Chapter](#)] [[Deselect Entire Chapter](#)]
- \* Compensation, Reimbursement, and Indemnification (1210)
- \* Credit Union Culture (1100)
- \* Operations (1240)
- \* Equal Opportunity Statement (1170)
- Organization (1200)
- Legal Counsel (1400)
- Staffing (1500)
- Whistleblowing Protection Policy (1505)
- Nepotism (1510)
- Families First Coronavirus Response Act (1515)

## When Publishing – Additional Text Can Be Added to the Title Page

- When choosing the settings for a published manual, a new field is available to allow custom text to be added to the title page.

<p><b>Additional Text on Title Page</b></p> <p>To be placed just below the Published Document Title and Organization Name:</p> <div style="border: 2px solid red; padding: 5px;">The policies contained in this document are confidential and the property of ABC Credit Union.</div>	<p style="text-align: center;"><b>ABC Credit Union Lending Policies</b></p> <p style="text-align: center;"><b>ABC Credit Union</b></p> <p style="text-align: center;">Policies Published: August 24, 2021</p> <div style="border: 2px solid red; padding: 5px;">The policies contained in this document are confidential and the property of ABC Credit Union.</div>
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## When Publishing – The Table of Contents at the Beginning of Each Chapter Can Be Suppressed

- A published manual will include the full table of contents for all included policies. At the beginning of each separate chapter, a table of contents for the individual chapter is also included. In some cases (for instance, a manual with very few policies included), the chapter-level table of contents may be redundant. This setting allows you to choose if the chapter-level table of content pages will be included or not included.

**Include Separate Table of Contents For Each Chapter:**

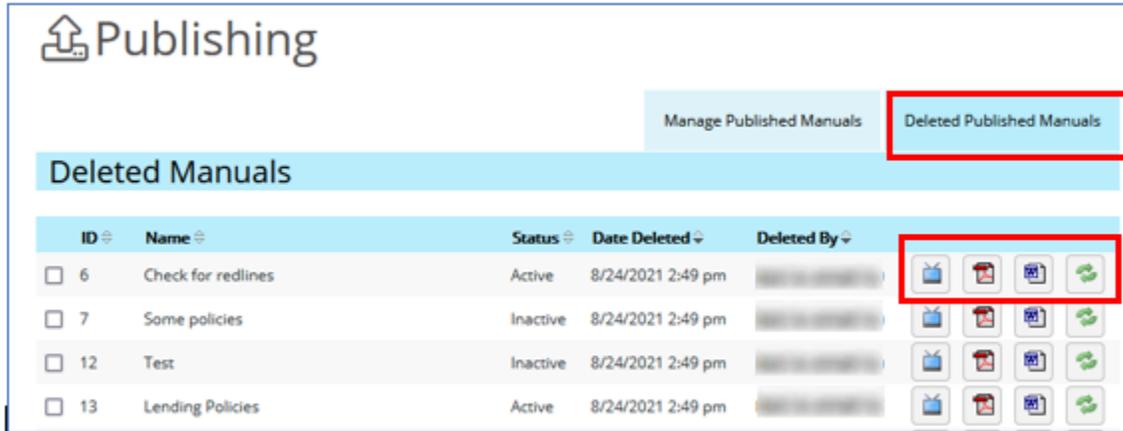
Yes
Yes
No

Table of Contents	
• <a href="#">Chapter 1000: Administrative</a>	
• <a href="#">Policy 1210: Compensation, Reimbursement, and Indemnification</a>	
• <a href="#">Policy 1100: Credit Union Culture</a>	
• <a href="#">Policy 1240: Operations</a>	
• <a href="#">Policy 1170: Equal Opportunity Statement</a>	
• <a href="#">Policy 1200: Organization</a>	
• <a href="#">Chapter 2000: Leadership</a>	
• <a href="#">Policy 2001: Leadership</a>	
• <a href="#">Policy 2100: General Operations Policies</a>	
• <a href="#">Policy 2110: Bank Secrecy Act/Anti-Money Laundering Program</a>	
• <a href="#">Chapter 3000: Accounting</a>	
• <a href="#">Policy 3165: Loan Workouts and Nonaccrual Standards</a>	
• <a href="#">Policy 3170: Troubled Debt Restructure</a>	
• <a href="#">Chapter 4000: Security</a>	
• <a href="#">Policy 4100: General Security Procedures</a>	
• <a href="#">Policy 4110: Burglary</a>	
• <a href="#">Policy 4120: Information Security</a>	
• <a href="#">Chapter 5000: Asset/Liability Management</a>	
• <a href="#">Policy 5100: General Asset/Liability Management</a>	
• <a href="#">Policy 5100: ALCO Key Objectives</a>	

Chapter 1000: Administrative	
• <a href="#">Policy 1210: Compensation, Reimbursement, and Indemnification</a>	
• <a href="#">Policy 1100: Credit Union Culture</a>	
• <a href="#">Policy 1240: Operations</a>	
• <a href="#">Policy 1170: Equal Opportunity Statement</a>	
• <a href="#">Policy 1200: Organization</a>	

## Deleted Published Manuals Can Be Restored

- A new tab is available in the Publishing area which will show deleted published manuals (note: this will not show previously deleted published manuals, just those from this point forward). From this screen deleted manuals can be viewed, downloaded, or restored.



The screenshot shows the 'Publishing' interface. At the top left is the 'Publishing' logo. On the right, there are two tabs: 'Manage Published Manuals' and 'Deleted Published Manuals', with the latter highlighted by a red box. Below the tabs is a section titled 'Deleted Manuals'. This section contains a table with the following columns: ID, Name, Status, Date Deleted, and Deleted By. The table lists four entries with their respective details. To the right of each row is a set of four icons: a TV, a document with a red X, a document with a blue checkmark, and a green recycling symbol. The icons for the first row are highlighted with a red box.

ID	Name	Status	Date Deleted	Deleted By	Actions
<input type="checkbox"/> 6	Check for redlines	Active	8/24/2021 2:49 pm	[Redacted]	[TV] [X] [Check] [Recycle]
<input type="checkbox"/> 7	Some policies	Inactive	8/24/2021 2:49 pm	[Redacted]	[TV] [X] [Check] [Recycle]
<input type="checkbox"/> 12	Test	Inactive	8/24/2021 2:49 pm	[Redacted]	[TV] [X] [Check] [Recycle]
<input type="checkbox"/> 13	Lending Policies	Active	8/24/2021 2:49 pm	[Redacted]	[TV] [X] [Check] [Recycle]