Use the Quick Start Guide for the very basics – finding policies, viewing and printing model content, and adding model content to your policy manual.

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For additional information on how to use CU PolicyPro, including editing policies, adding users, publishing and posting your manual, we recommend watching the New User and Advanced User Training video series. To access video training, follow this link: http://www.cusolutionsgroup.com/Training-Videos-380.html

For technical support, please contact hrsupport@cusolutionsgroup.com.
QUICK START GUIDE

All policies are housed in the MANUAL BUILDER area of CU PolicyPro. All steps in this document take place in the MANUAL BUILDER. Manual Builder can be opened by clicking on the “MANUAL BUILDER” link on the right side of the screen when you first login.

Navigating MANUAL BUILDER

Near the top left of the screen, there are links to access the Working Manual, Master Manual and Archive. When you access MANUAL BUILDER, by default you will be in the Working Manual.
Important Definitions

- The **Working Manual** is used to maintain and customize the policies for your credit union. When we set up your CU PolicyPro, the Working Manual does not contain any policies, but policies can be added at any time (see “Adding Policies to the Working” section). Any policy placed in the Working Manual can be edited.


- The **Archive** allows you archive policies from the Working Manual. The archive function is not used as part of policy set up, and is not covered in this document. More information on the archive is available in the new user training session.

Viewing & Printing Model Policies

1. Click on the “Master” link at the top left of the screen.

2. You will see a folder called “Manual Administration” with a plus sign next to it. Click the plus sign to expand your options.

3. You will see a folder called “Master Manual” with a plus sign next to it. Click the plus sign to expand your options.

4. You will see a listing of all the available model polices.

5. Click on the model policy you would like to view, and the full text of the policy will appear on the right side of the screen.

6. To Print a model policy, click the “Print” button at the top of the model content.
Adding Policies to the Working

Adding policies from the Master to the Working can be done one of two ways.

**Option 1: Add multiple policies at one time.** This option works best if you know exactly what policies you’d like to bring into your Working Manual, and do not need to review the content prior to bringing the content into your Working Manual.

1. Click on the “Working” link at the top right of the screen to make sure you are in the Working Manual.
2. Using the plus signs to the left of each folder, expand the “Manual Administration” and the “Manual Section Management” folders.
3. Under the “Manual Section Management” folder, click the “Multi-Add to Working from Master Utility” link. This brings up a form listing all the model policies available in the Master Manual, with a checkbox next to each section.
4. Click the checkbox next to each model policy that you want to move from the Master Manual to your Working Manual.
5. Scroll to the end of the page and click the “Add to Working from Master” button. The current Master version of each selected policy will be added to your Working Manual.
Option 2: Add one policy at a time. This option works best if you want to review the content of a model policy before bringing the policy from the Master Manual to the Working Manual.

1. Click on the “Master” link at the top right of the screen to make sure you are in the Master Manual.

2. Using the plus signs to the left of each folder, expand the “Manual Administration” and the “Master Manual” folders.

3. You will see a listing of all the available model policies.

4. Click on the model policy you would like to view, and the full text of the policy will appear on the right side of the screen.

5. Click the “Copy to Working Manual” button to move a copy of this model policy to the Working Manual.

Finding a Specific Policy

If you’re looking for a specific policy, you can use the “Search” function, found in the upper left side of the navigation. Either the Working Manual or Master Manual content can be searched; however, for a complete search of the model content, we recommend you search from the Master Manual.

Also, the Alphabetical Policy List is a great tool to find a specific policy. To view the Alphabetical Policy listing, follow this link: https://cusg2011.secure.cu-village.com/files/cusg2011/15/file/Pro%20Products/System%20Documentation/Alpha%20Policy%20List.pdf