



QUICK START GUIDE

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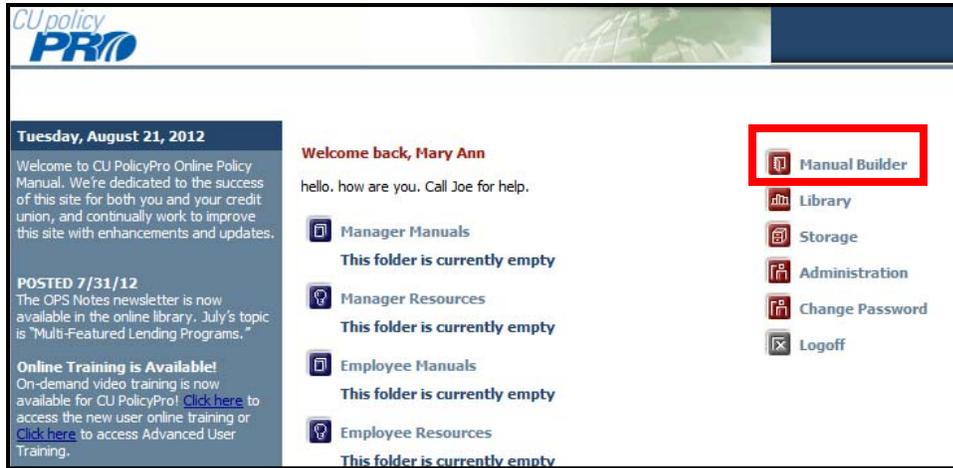
For additional information on how to use CU PolicyPro, including editing policies, adding users, publishing and posting your manual, we recommend watching the New User and Advanced User Training video series. To access video training, follow this link:

<http://www.cusolutionsgroup.com/Training-Videos-380.html>

For technical support, please contact hrsupport@cusolutionsgroup.com.

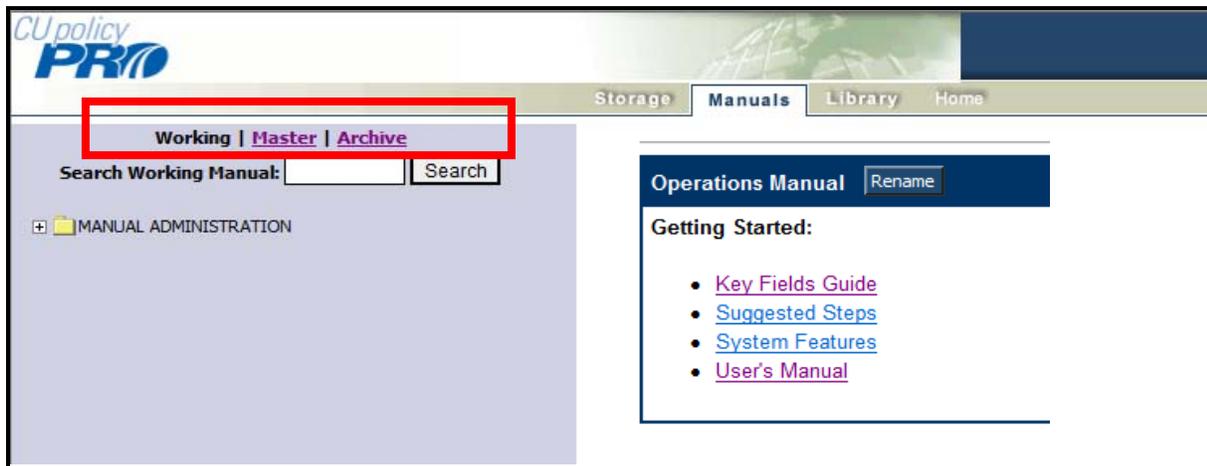
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All policies are housed in the MANUAL BUILDER area of CU PolicyPro. All steps in this document take place in the MANUAL BUILDER. Manual Builder can be opened by clicking on the "MANUAL BUILDER" link on the right side of the screen when you first login.



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*.



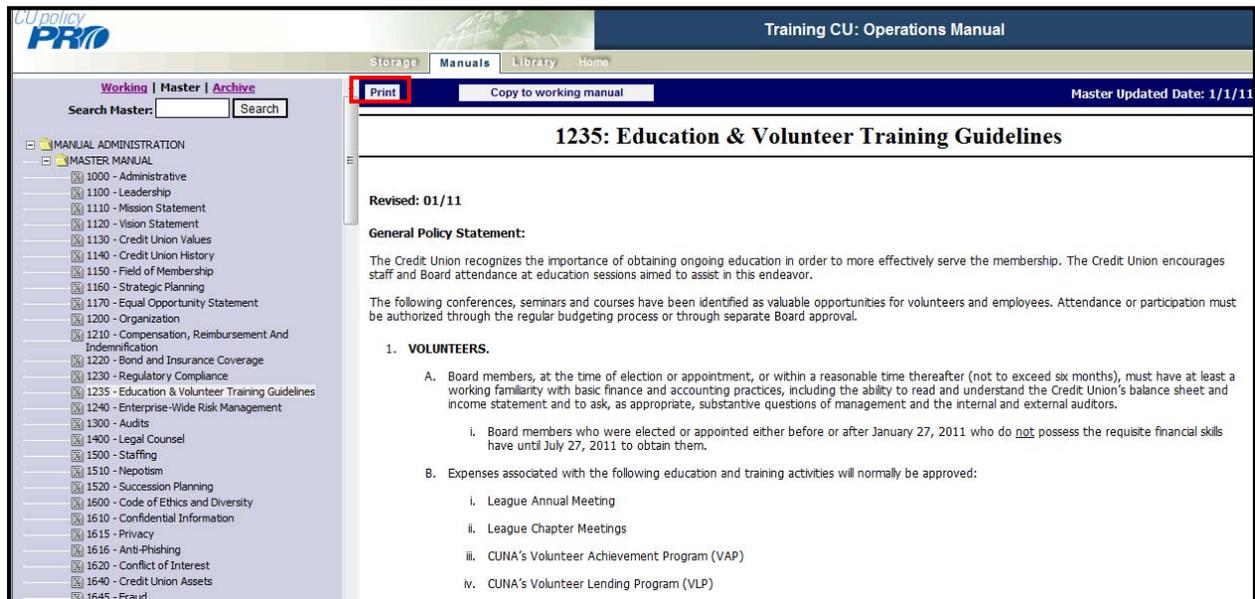
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Important Definitions

- 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 **Master Manual** contains all available model policies. Any model policy can be copied from the *Master Manual* and placed into the *Working Manual*. (see “Viewing & Printing Model Policies” section, and “Adding Policies to the Working” section).
- 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 policies.



The screenshot displays the CU PolicyPro web application. At the top, there is a navigation bar with 'Storage', 'Manuals', 'Library', and 'Home' tabs. Below this, there are links for 'Working', 'Master', and 'Archive'. A search bar is present with the text 'Search Master:'. The main content area is divided into two sections. On the left, a tree view shows the 'MANUAL ADMINISTRATION' folder expanded to 'MASTER MANUAL', which contains a list of policy categories such as '1000 - Administrative', '1100 - Leadership', and '1235 - Education & Volunteer Training Guidelines'. The '1235' policy is selected. On the right, the full text of the '1235: Education & Volunteer Training Guidelines' policy is displayed. The policy includes a 'Revised: 01/11' date, a 'General Policy Statement' section, and a list of 'VOLUNTEERS' with sub-points A and B. A red box highlights the 'Print' button at the top of the policy content area.

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.

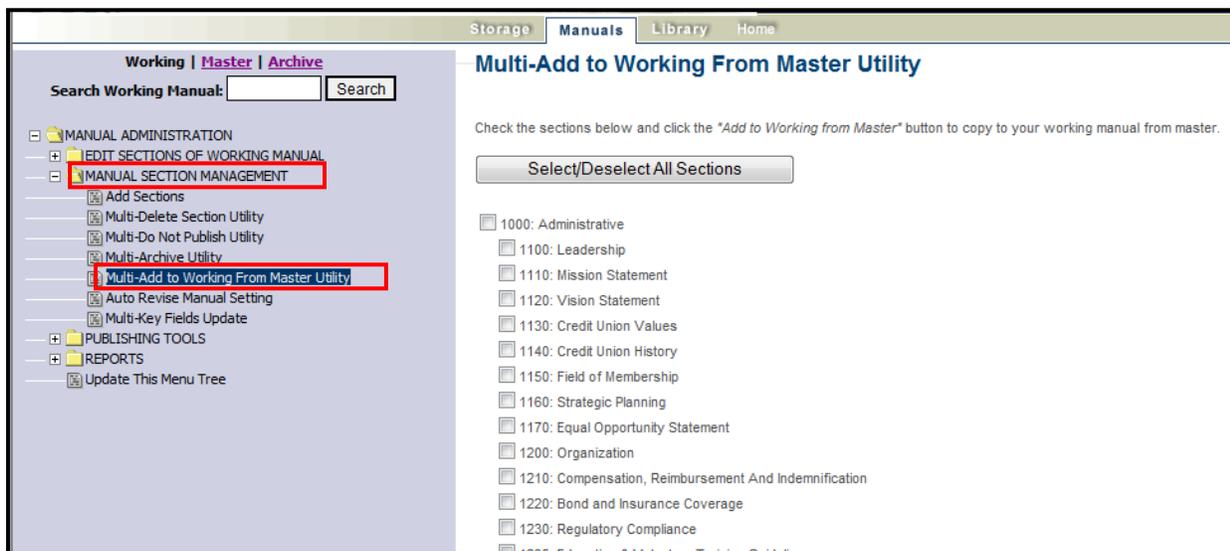
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Adding Policies to the Working

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*.

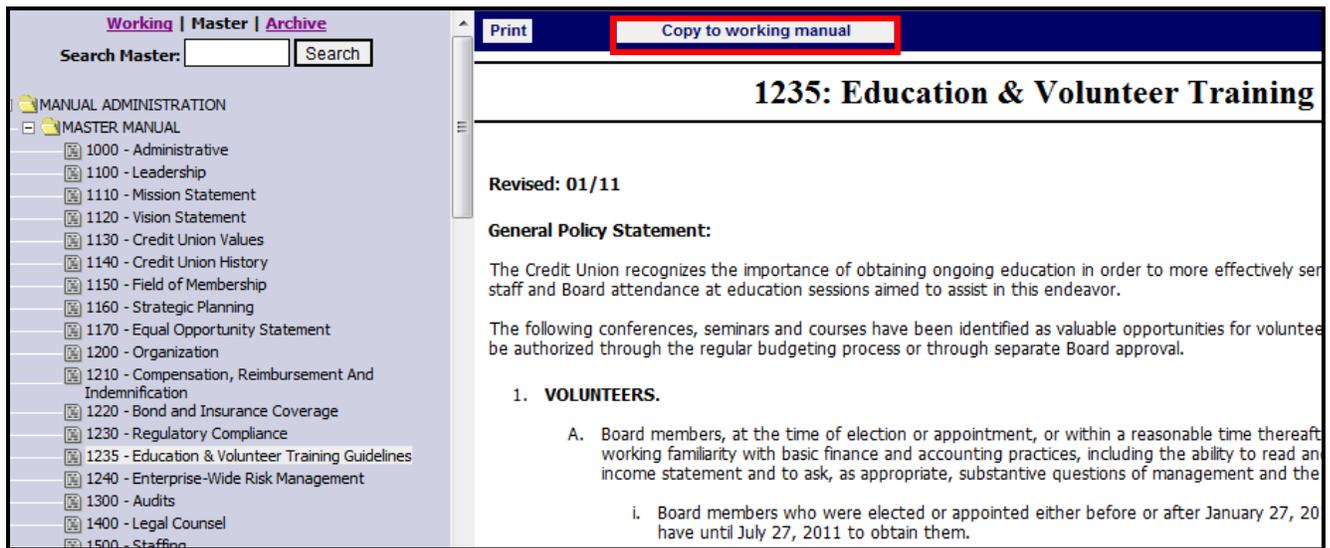


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Adding Policies to the Working (continued)

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.

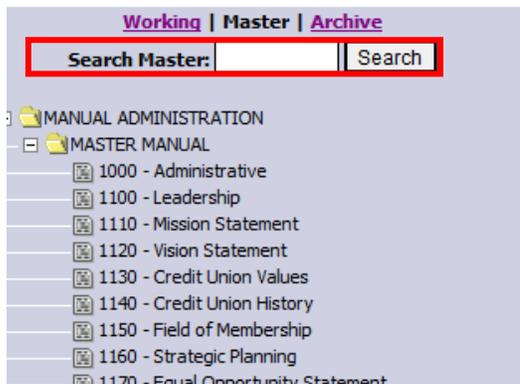


The screenshot displays a web interface with a navigation pane on the left and a main content area on the right. The navigation pane shows a tree structure under 'MANUAL ADMINISTRATION' and 'MASTER MANUAL', with various policy categories listed. The main content area shows the details for policy '1235: Education & Volunteer Training', including a 'Revised: 01/11' date, a 'General Policy Statement' section, and a list of 'VOLUNTEERS' with specific sub-points. A 'Copy to working manual' button is highlighted with a red box in the top right corner of the interface.

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*.



The screenshot shows the search function in the policy management interface. The 'Search Master:' text box and the 'Search' button are highlighted with a red box. The navigation pane on the left shows the same tree structure as in the previous screenshot, with the 'MASTER MANUAL' folder expanded.

Also, the **Alphabetical Policy List** is a great tool to find a specific policy. To view the Alphabetical Policy listing, follow this link: <https://cusq2011.secure.cu-village.com/files/cusq2011/15/file/Pro%20Products/System%20Documentation/Alpha%20Policy%20List.pdf>